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ABSTRACT

Based primarily on data from public service broadcasting, this study had two major purposes: to develop a framework for understanding, conceptualizing, and measuring international television flows and the effects associated with these flows; and to establish a background of facts on international television flows in Western Europe. Secondary purposes include an evaluation of the "media imperialism" thesis as an explanation of the patterns of flow that can be observed; and an investigation of the validity of researchers' and politicians' claims that the United States dominates Western European television. The first of five chapters in the report describes the purposes of the study and provides a review of earlier research. The second chapter outlines the conceptual framework of the study and describes transnationalization of supply and consumption of television broadcasting. Addressing the second major purpose of the study, the third chapter provides data on transnationalization of television in Europe. Discussions of the media imperialism thesis and both positive and negative effects of transnationalization are presented in the fifth chapter. The final chapter outlines policy and research implications of the study. The report includes 28 tables, an extensive list of references, and three appendixes which include a review of the empirical research on which the study is based and the absolute data from which the tables were derived. (GL)

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working paper

Preben Sepstrup

TRANSNATIONALIZATION OF TELEVISION IN WEST EUROPE

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TRANSNATIONALIZATION OF TELEVISION IN WEST EUROPE

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Preface

This study is published as a 'working paper' because

(1) it allows a distribution without charge
(2) I have not been able to find a publisher with an international distribution capacity who could identify a commercial market for a book based on this manuscript.

The text is final, not a draft even though the lay out needs a final touch and the manuscript has not been copy edited by anyone with English as a first language.

I am grateful to a number of persons who have critically read the first draft and offered a number of suggestions which I have used for improvements:

Morten Giersing, UNESCO
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Mariann Holmslykke has typed the manuscript.
The Aarhus School of Business Administration and Economics gave me the grant which was necessary to carry out the project.

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Chapter 1

B A C K G R O U N D

PURPOSE

One **main purpose** of this study is to develop a framework for understanding, conceptualizing and measuring international *television* flows and the effects associated with these flows. Such a framework must be able to systematize existing research (associated with nationally distributed television only) and to incorporate the new dimensions of international television flows caused by the development of information technology (satellites and cables).

Such a framework is necessary for the other **main purpose** of this study which is to establish a background of facts on international television flows in West Europe, primarily by critically reviewing the validity (and background) of the prevailing perceptions of these flows and by reporting all relevant studies in a homogeneous way in one place.

The *theoretical motive* for sorting out what is really known on international television flows and West Europe is the uncertain role of West European countries in research on international television flows, especially as to the theories on 'media imperialism' (see below). The *practical motive* relates to the crucial role of television flows in West European media policy at both the national and international level such as the EEC and the European Council. It is hoped that a compilation of published data on television flows can contribute to realistic media policy considerations in West Europe and to an evaluation of the relevance of on-going activities at both the national and the international level[1].

Related to these motives the study has at the least two **sub purposes**:

first, almost all studies in the general field of research into international communication flows are related to some idea of the existence of a cultural or media imperialism phenomenon and most studies try to describe this 'imperialism' and its consequences. This study tentatively tries to evaluate the validity of the 'media imperialism thesis' as an ex-

[1] In 1988 for example the European Task Force on the media; the proposal for an European Council convention and the proposal for an EEC directive concerning television flows between the EEC countries and other European Council and EEC attempts to strengthen the visual industries of Europe.

planation of the flow patterns that can be observed. The concept of media imperialism is discussed and the conclusions on the validity of the media imperialism thesis for West Europe are reported in chapter 4 ("Determinants and effects of transnationalization").
Second, the practical or political parallel to the first theoretical sub purpose is to investigate the validity of the prevailing ideas found among most researchers[1] and almost all politicians of a US 'dominance' or 'undue´ influence in West European television which evidently guide much of both national and international cultural policy in West Europe.

The study to be presented is *primarily based on data for public service broadcasting and consequently valid for public service broadcasting mostly*[2]. This restriction is forced upon the study. The situation of the private stations changes rapidly and reliable, relevant data are normally not available. With few exceptions (especially Italy) this is not an important restriction in the broadcast situation of today. However, the conclusions reached in this study may change if more national, private channels develop and capture a market or if the private Pan-European satellite channels achieve a significant share of consumption time.
The study is limited to broadcasters with national coverage since there are no relevant data for regional and local services. Due to the individual nature of existing regional and local services it is impossible to say how this restriction influences the conclusions of this study.
Television has a programme element and an advertising element. This study is on the programme element only[2].

---

[1]General references like this always refer to the publications included in the list of references.

[2]The only important exceptions are the section "Transnationalization and communication" and some data on supply and consumption of satellite distributed television.
The concept of public service broadcasting includes non-commercial channels, i.e., they have no profit motive and they are not advertising vehicles (e.g., DR in Denmark) *and* commercial channels without a profit motive but partly (ZDF in West Germany) or totally financed by advertising (ITV in Great Britain). Pragmatically one may define public service broadcasters as broadcasters which can be accepted as full members of the European Broadcasting Union. For a more substantial discussion of the concept of public services broadcasting, see Sepstrup(1988). The concept of public service broadcasting is related to the obligations of the channel, like plurality, diversity and versatility. The opposite of public service channels are private channels. Both categories can be commercial in the sense of carrying advertising whereas only private channels can be commercial in the sense of having a profit goal.

[2]The framework used in this study may also be applied to the advertising element. However, there is absolutely no empirical background available today for such an approach. All research on international flows of advertising rely on the 'nationality' of advertising agency capital which is of little or no relevance to the effect measures suggested below.

EARLIER RESEARCH - A BRIEF CRITICAL NOTE

This study belongs to the extensive tradition of research on international communication flows. As already mentioned most contributions are related to a (more or less explicit) discussion of the 'media imperialism thesis' as introduced by Schiller(1969 and 1976) and developed and discussed by *for example* Nordenstreng and Varis(1974); Read(1976); Boyd-Barret(1977); Tunstall(1977); Lee(1980); Mattelart et al(1984) and Lealand(1984).

The essence of the very much debated media imperialism thesis is that a few countries - and especially the USA - dominate both international and national media structures and contents whereby they impose their cultures, values and ideologies on the receiving nations. Depending on the specific stand-point more or less emphasis is given to the 'conspiracy' or 'intentionallity' version, i.e. that this dominance is aimed at by the big countries (USA) and multinational corporations not only for the sake of economic profit but also for ideological reasons, i.e., for the sake of disseminating cultural and political values, business norms, consumption orientation, life styles, etc. The basic 'media imperialism thesis' thus comprises both a hypothesis on imbalances in international television balances, a hypothesis on cultural effects in specific groups following from these imbalances and a hypothesis on the reasons for the lack of balance.

The most 'rough' versions of the 'media imperialism thesis' have been opposed, modified and developed by both conservative and critical researchers. Interesting theoretical contributions are *for example* Nordenstreng and Varis(1974); Tunstall(1977); Mattelart et al(1984) and Garnham(1977 and 1979). Pragnell(1985) and Tracey (1985) are recent examples of a rigorous rejection of the 'conspiracy' oriented version of the media imperialism thesis.

Without going into details here of the twenty year long discussion of the determinants of the international television trade pattern it appears fair to conclude that the position of West European countries in the media imperialism framework is uncertain[1]. Also the empirical evidence behind the dominant understanding of international television flows[2] is very scarce, especially on the effects of these flows. Up till today the empirical

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[1]'Media imperialism' is most often related to 'developing countries' being 'imperialized' by 'developed countries'. However, I have not identified authors who explicitly restrict the concept or thesis to be used in relation to 'developing countries' and thus excluding, e.g., West Europe from the validity of the media imperialism thesis.
[2]See chapter 3 "Transnationalization of television in West Europe".

'evidence' in both major and minor contributions to the research on international communication flows as a main rule has been made up by compilations of examples at 'a trade press level' (and of routine references to the classical systematic empirical work by Nordenstreng and Varis,1974). Lately, references are normally given to Varis(1985) (replicating Nordenstreng and Varis,1974) which, however, has not changed the dominant understanding since Varis (1985) concludes that the situation of international television flows is the same as reported in Nordenstreng and Varis(1974).

The empirical evidence in the main stream of research on international television flows has been characterized as "anecdotal and circumstantial" (Lealand,1986, page 7; see also Tracey,1985 for a parallel recent critique). Except for the dedicated empirical studies listed in Annex 1 (and reviewed in chapter 3) it is difficult to reject this critique.

Another peculiarity of existing research on international communication flows is 'substantiation' of 'descriptions' by referring to a small number of highly quoted publications - without checking thoroughly the validity of these references for the subject under study[1].

As will be demonstrated the dedicated empirical studies (cf. Annex 1) are generally not very convincing as to methodological approaches and the reliability of their results. And in the remaining part of research on international communication flows there is a conspicuous lack of interest in traditional empirical documentation. Both observations may be related to a low interest in theoretical issues and to the lack of explicit frameworks and well defined concepts to direct empirical research[2].

Discussions in the relevant literature have not been on the theoretical foundation, methodology, quality of data, validity of hypotheses or development of a general framework and universal specific concepts and analytical tools but politically inspired discussions between the 'Schiller, Smythe, Hamelink, Fejes, Janus' inspired (conspiracy) arm of the media imperialism school and the 'Pool, Read, Lee, Boyd, Tarle' viewpoints on media imperialism which roughly understands the (trade) imbalances as results of inevitable market laws and which do not accept that ideological motives may be behind. (See references). The political nature of this discussion has to a

---

[1]Typical examples of these highly quoted publications are the many works by Schiller, especially 1969 and 1976; Nordenstreng and Varis,1974; Mattelart,1976; Boyd-Barret,1977; Hamelink,1977; Katz and Wedell,1977; Tunstall,1977; Mattelart,1979; Nordenstreng and Schiller,1979; Lee,1980.

[2]There are of course several exceptions to such general characteristics. Typical examples of exceptions at the theoretical level are Mattelart et al (1984) and Garnham (1977 and 1979). Critical attitudes toward the theoretical level can be found in Tunstall(1977). Boyd-Barret(1977); Fejes(1981); Schement et al(1984) and Cantor and Cantor(1986); Lealand(1984) and Tracey(1985) represents a strong critical attitude toward the empirical level of the research under observation here.

large degree prevented the 'members' of these 'schools' - and others trying to find their feet - from being critical at a scientific level.

The lack of traditional empirical evidence in most publications, the weak theoretical frameworks and the lack of conceptual clarity probably to a large degree explains why the research on international communication flows have contributed so relatively little to concrete policy measures[1]. Also the undifferentiated approach to individual countries and cultures and the lack of understanding of local determinants of national media patterns have prevented this research from important political influence[2]. It is always difficult for social science research to come up with policy propositions not to say to influence political decision making. However, there is no doubt that one precondition for such influence is a high level of traditional (positivistic) social science research standard which generally spoken is not the trade mark of the research on international communication flows.

Though pointed out as a severe weakness already in Nordenstreng and Varis(1974) and Tunstall(1977) and recently in Lealand(1984) and Tracey(1985) *the lack of interest in the consumption* (or uses and gratifications) *of the observed flows* has remained a serious shortcoming of the research on international television flows. Research attention has focused on imports and exports but not on the consumption of the import and the impact of this consumption. It is as if the 'hypodermic needle effect theory' has remained valid in this area of communication research. If there is an import, there is consumption and if there is consumption there is an effect consisting of adoption of (US) values.
Probably almost all communication researchers more or less denies such simple deductions but more than twenty-five years after Klapper(1960) many contributions exhibits a slight suspicion that on the other hand there must be 'something about it'. It is demonstrated later in this study that it is a reasonable hypothesis that consumption of foreignly produced television seems to follow supply but there is very little if any documentation that this consumption leads to adoption of for example US life styles. One might as well set up the hypothesis that in some groups existing (negative) attitudes toward US values

---

[1]In the next chapter "Conceptual framework" it is suggested to distinguish between 'first and second level' effects' of international television flows. The critique of empirical weaknesses is relevant to both levels but especially to the lack of basic knowledge at the 'first level'. The lack of an explicit theoretical framework has especially had consequences for mixing 'first and second level' effects and for easy assumptions on 'second level' effects. The lack of conceptual distinctiveness has worked negatively in relation to both the 'first and second' level and is especially responsible for the weak operationalizations behind empirical works.

[2]Significant exceptions are Katz and Wedell(1977); Tunstall(1977) and Mattelart et al(1984) which explicitly state these problems.

are reinforced or existing positive attitudes rejected. The possibility of confusing supply with actual effects is a main reason for stressing the two level of effects in the framework proposed in the next chapter.

Methodologically, I am convinced that examples are an acceptable way of creating evidence - and that there are other ways of creating knowledge and understanding than those stipulated by the positivistic epistemological understanding. The shortcomings of the example compilation method of the majority of studies of communication flows are not the use of examples as such but (1) the absence of a theoretically based systematic framework to guide compilation and understanding of examples, (2) the lack of discussion of the validity of the examples to the problems raised, (3) the low interest in conceptual clarity and procedures for operationalization of concepts and (4) the limited interest in separating causes and effects.

In brief, it is my conclusion from reviewing the publications in the list of "References" that several question marks are appropriate concerning the methodological approaches and the empirical foundation of the research on international communication flows. I am fully aware that it takes a much more detailed review of the literature and specific documentation to substantiate such a serious and theoretically oriented critique. However, due to the basically pragmatic approach of this study, I have concentrated on suggesting a framework which may guide *future* research and to use this framework for reviewing existing empirical data on international television flows in West Europe - also those data which according to my critique are less valuable for understanding the consequences of these television flows. In the last two chapters of the study this is followed up by a discussion of the 'media imperialism thesis' as an explanation of the observations reported and by proposing some main implications for future research and for the media policy decisions in the present turmoil of media development in West Europe.

Chapter 2

CONCEPTUAL FRAMEWORK

The general purpose of all studies on international television flows has been to establish knowledge of flows of television between countries on the assumption that these flows imply cultural and economic effects in specific countries or regions or among specific groups of viewers.

Some of the most used concepts in the studies on international television flows are 'international', 'transnational', 'internationalization' and 'transnationalization'. The publications in the list of references leave the impression that these concepts are normally used in a common sense way (i.e., without explicit definitions) to describe both the flows (the independent variable) and the effects (the dependent variable).

A specific investigation of the application of the above mentioned concepts in a number of central contributions to the literature on international communication flows did not add to the conceptual clarity. (Nordenstreng and Varis,1974; Read,1976; Tunstall,1977; Lee,1980; **Many Voices**,1980; Janus,1981; Janus and Roncagliolo,1979 and 1981; Hamelink,1983 and 1987; Anderson,1984; Mattelart et al,1984; Mowlana,1984; Varis,1985)[1].

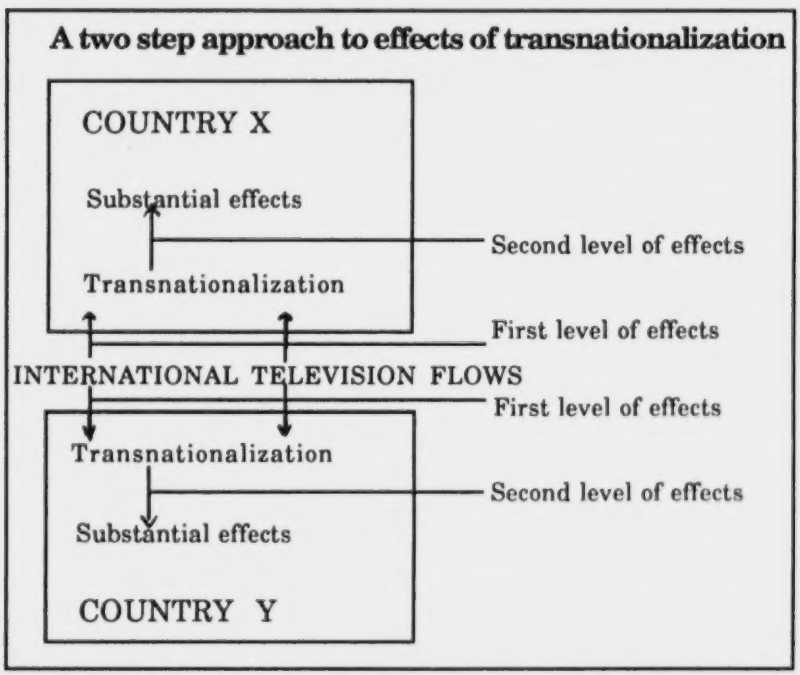
In these publications 'internationalization' and the recently more used 'transnationalization' are used to describe several phenomena, like expansion of something transnational, the global penetration of for example advertising, the transcending of borders, growth of transnational companies or even growth of co-productions and effects like homogenization of cultures, creation of new non-indigenous cultures and cultural 'synchronization'.

The publications in the list of references are all interesting contributions to the study of international communication flows but none of them offer a general systematic or communication theory related approach or just a consistent vocabulary which could be used by others. Instead this research is consists of fragmented approaches and reportings of findings. There is an obvious need for a framework which can guide descriptions and analyses of international communication flows. Also, for the purpose of this study, such a framework is needed.

---

[1]Read(1976, page 18) explicitly tries to make a distinction between 'international' and 'transnational'. Mowlana(1984), page 4) explicitly defines what has here been called the general common sense understanding of transnational or international: "International flow of information is defined here as the movement of messages across national boundaries between and among two or more national and cultural systems."

As a modest beginning of a unified, systematic approach I suggest an understanding of international television flows based on two steps. *First*, the international flows as defined by Mowlana(1984, page 4, see above) are considered an *independent* variable influencing or determining the *dependent* variable 'transnationalization'. This means that transnationalization is understood as a 'first level' of effects of the international flows. As the *second* step transnationalization is considered an *independent* variable creating or determining the *dependent* variable, i.e., the (substantial) effects which are in focus from a cultural, economic or consumer point of view, like formation of values, contents of television, conditions for national public service broadcasters or consumption patterns (see illustration next page).



At the first level transnationalization is a dependent variable and at the second level an independent variable.
The independent variable at the first level is 'television flows'. At the second level the dependent variable is 'substantial effects'[1].

This study focuses on transnationalization as an effect of international television flows. This first level of effects must be thoroughly and systematically described before the second and more interesting and substantial level of effects can be analysed. In some

[1]The determinants of the outspring of this approach, i.e., the international television flows, are of course very important for understanding the effects. These determinants are briefly discussed in the section "Determinants of transnationalization". The second level effects are very briefly discussed in the section "Consequences of transnationalization" while the first level effects are described in detail in the next chapter.

ways this is not a very exiting exercise - which may be why there are so many attempts to jump from some kind of description of flows to the second level of effects. However, the first step is necessary for establishing a qualified background for approaching the 'second level effects'.

Concentrating now on the 'first level' of effects, I suggest that the effect variable 'transnationalization' is related to a specific 'area' like a country or group of countries or specific groups of TV viewers[1]. 'Transnationalization', therefore, basically is perceived as a national phenomenon which is a consequence of international flows as defined above. Transnationalization of supply therefore is transnationalization of nationally offered supply which here means television signals which by us of standard technology are available in a given country (group of countries or groups of viewers).

The next step necessary in a systematic approach is to specify the *object* of 'transnationalization'. The objects normally dealt with in existing research are 'ownership', 'supply' and to some extent 'consumption'. I will here concentrate on 'transnationalization of supply of television' and 'transnationalization of consumption of television'.

For the purpose of finally defining and operationalizing 'transnationalization of national supply' and 'transnationalization of national consumption' I suggest a distinction between three 'sources' or 'dimensions' of supply (and corresponding consumption). According to these distinctions television supply is divided into the national supply of *multilaterally* distributed television, the national supply of *bilaterally* distributed television and the nationally supply of *nationally* distributed television. As a consequence of this there are also three sources or dimensions of transnationalization, namely the national, the bilateral and the multilateral dimension which together constitute total transnationalization of supply and consumption.

The national dimension of national supply and consumption relates to television distributed by domestic media (e.g., the national public service broadcasters). This is called 'nationally distributed television'. The national dimension of transnationalization thus relates to television distributed by domestic media.

---

[1]For the sake of convenience I primarily associate transnationalization with *individual* countries in the following presentation of the outline of a conceptual framework for the first level of analysis.

The bilateral dimension of national supply and consumption relates to television originating in specific, foreign, *domestic* media, reaching the nation under consideration simultaneously and unedited over the air or by some other technical mean (e.g., West German television in the neighbour countries). This is called 'bilaterally distributed television'. The bilateral dimension of transnationalization thus relates to bilaterally distributed television.

The multilateral dimension of national supply and consumption relates to television originated outside the country and with no *single* intended direction of the flow (e.g. the signals from Pan-European satellites). This is called 'multilaterally distributed television'. The multilaterally dimension of transnationalization thus relates to multilaterally distributed television.

Every communication flow has of course a technical point of origin. In principle the multilateral dimension could therefore be expressed as the sum of bilateral transnationalization measures between this (technical) country of origin and the countries where the signals are available. However, the substance of the multilateral dimension is the existence of communication flows for which the 'uplink country' is (relatively) unimportant and for which a multiplicity of directions are *intended.*

The classification of television as bilateral or multilateral therefore depends on the motives for distributing the signals. Bilateral television assumes a national anchoring of the distributor and national distribution as the totally dominating purpose. The distributor of multilateral television has no substantial national relationship and distribution to several countries is the dominating purpose of the activity.

Why now these categories or dimensions of transnationalization? One reason is that they are directly related to the sources of supply and therefore convenient for future research because they adapt the analysis of international television flows to the development of information technology in recent years in West Europe.

Since Unesco (Varis,1985) did its last study in 1983, reception from neighbour countries has kept growing, satellite channels have arrived and the number of West European television channels almost doubled (Schrape,1987, cf. **Television programming**...,1987). This is a purely 'practical' argument for the choice of categories without much (immediate) relevance for understanding the effects of international television flows. On the other hand it *is* necessary to keep track on sources and routes for television output (and consumption) in a given country and for this purpose the suggested

main categories of transnationalization are useful for both economically, technologically and culturally oriented media policy decisions[1].

One may argue that the categories of transnationalization are not closely enough related to the effects sought since the starting point for all understanding of both 'first and second level' effects should be related to consumption. (This point of view will be developed further later). Also it is uncertain (nobody *knows*) whether or how viewers separate between, e.g., bilaterally and multilaterally distributed television (especially if in the same language). And there is no basis for supposing that viewers necessarily understand 'transnationalization of nationally distributed supply' along the lines suggested here. For example we do not know whether foreignly produced television distributed in dubbed or texted versions by national media is perceived as 'foreign' in the same way as bilaterally or multilaterally distributed television. It is also possible that language factors are more important for viewers than the foreign/domestic distinction not to mention the technical origin of a programme.

But then on the other hand and in defense of the proposed categories of transnationalization, viewers *perception* of these issues are not necessarily related to the *effects* of the transnationalization of their consumption. Therefore, in spite of the 'reception arguments' above I find there are not only (research and policy) 'technical' reasons but also substantial, i.e., effect related arguments for an attempt along the lines suggested here to identify separate elements of transnationalization. Simply because these elements are (supposed) to be related to significant characteristics of programming. It goes without saying that this is true for national cultural characteristics and language. But it is also evident that the programme content (and programme categories) vary significantly with the sources of supply. Probably *not* only with the categories suggested her but enough to justify their use as a starting point[2]. Transnationalization is not transnationalization! Especially the important 'second level' effects are related to the sources of transnationalization and - according to my judgement - enough to the categories in the suggested framework to justify this together with the 'technical' arguments.

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[1]As just three examples one can think of (1) the usefulness of being able to compare coefficients of utilization (share of supply consumed) related to public and private investments in technical facilities for providing a supply of the categories used here or (2) the need for (international) competing broadcasters to keep track on the sources and thereby the character of the competition or (3) that it is easy to imagine that politicians will ascribe different 'values' ('threats' or 'promises') to transnationalization of supply or consumption caused by nationally, bilaterally or multilaterally distributed television.

[2]See the section on transnationalization of consumption of different programme categories and especially the section "Transnationalization and commercialization" and the references in these sections for evidence.

Even if viewers do not care, researchers, broadcasters and politicians must care. Perhaps not exactly along the lines of the framework suggested here but at least along a development of these lines - most probably involving the dimensions of commercialization.

Based on the two step approach, the perception of transnationalization as basically a national phenomena, an explicit definition of the object of transnationalization, and the three dimensions of transnationalization it is now possible to suggest the following set of standard transnationalization measures of the 'first level effects' of international television flows.

TRANSNATIONALIZATION OF SUPPLY

THE MULTILATERAL DIMENSION

T(m)-S is the Supply of television in a specific country which is **m**ultilaterally distributed.
(T(m)-S may be measured in hours or as a share of total supply of television hours. In principle T(m)-S also applies to a group of countries or specific group of viewers.)
T(m)-S/CO is the Supply of television in a specific country produced in a designated Country of Origin which is multilaterally distributed.
(T(m)-S is the sum of T(m)-S/CO measures. T(m)-S/CO may be measured in hours or as a share of total supply of television hours or as a share of multilaterally supply. In principle T(m)-S/CO also applies to a group of countries or specific groups of viewers.)

THE BILATERAL DIMENSION

T(b)-S is the Supply of television in a specific country which is **b**ilaterally distributed.
(T(b)-S may be measured in hours or as a share of total supply of television hours. In principle T(b)-S also applies to a group of countries or specific groups of viewers.)
T(b)-S/CO is the Supply of television in a specific country from a designated Country of Origin which is bilaterally distributed.
(T(b)-S is the sum of T(b)-S/CO measures. T(b)-S/CO may be measured in hours, as a share of total supply of television hours or as a share of bilateral supply. In principle T(b)-S/CO also applies to a group of countries or specific groups of viewers. Notice that T(b)-S/CO normally has two elements - domestic production from the country of origin

and imported programmes to that country - which may influence a detailed calculation of an accurate T-S/CO (see below).

THE NATIONAL DIMENSION

T(n)-S is the Supply of television in a specific country which is **n**ationally distributed and has been produced outside the country under observation.
(T(n)-S may be measured in hours, as a share of total nationally distributed television supply or as a share of total supply in the country. In principle T(n)-S also applies to a group of countries or specific groups of viewers).[1]
T(n)-S/CO is the Supply of television in a specific country which is nationally distributed and has been imported from the designated Country of Origin.
(T(n)-S is the sum of T(n)-S/CO measures. T(n)-S/CO may be measured in hours, as a share of total nationally distributed television supply, as a share of all imported, nationally distributed television hours[2] or as a share of total supply in the country. In principle T(n)-S/CO also applies to a group of countries or specific groups of viewers).

T(m)-S, the T(b)-S and the T(n)-S measures may be added to one T-S measure covering all transnationalization of supply of television in the country (region or group) under observation. This is of course also true for a parallel T-S/CO measure.

TRANSNATIONALIZATION OF CONSUMPTION

THE MULTILATERAL DIMENSION

T(m)-C is the Consumption of television in a specific country which is **m**ultilaterally distributed.
(T(m)-C may be measured in hours or as a share of total consumption of television hours. In principle T(m)-C also applies to a group of countries or specific groups of viewers).

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[1]It appears to be primarily a question of definition whether to include co-productions as adding to T(n)-S. The issue may be of some practical relevance if co-producted television hours continue to grow. Unfortunately, the solution to the problem ideally seems to depend on the country under observation and the nature of the co-production.
[2]Later this dominating 'measure' in existing research will be demonstrated to be unsuitable and often misleading.

T(m)-C/CO is the Consumption of television in a specific country produced in a designated Country of Origin which is multilaterally distributed.
(T(m)-C is the sum of T(m)-C/CO measures. T(m)-C/CO may be measured in hours, as a share of total consumption of television hours or as a share of consumption of multilaterally distributed television).

THE BILATERAL DIMENSION

T(b)-C is the Consumption of television in a specific country which is bilaterally distributed.
(T(b)-C may be measured in hours or as a share of total consumption of television hours. In principle T(b)-C also applies to a group of countries or specific groups of viewers.)
T(b)-C/CO is the Consumption of television in a specific country from a designated Country of Origin which is bilaterally distributed.
(T(b)-C is the sum of T(b)-C/CO measures. T(b)-S/CO may be measured in hours, as a share of total consumption of television hours or as a share of consumption of bilaterally distributed television. in principle T(b)- C/CO also applies to a group of countries or a specific groups of viewers. Notice that T(b)-C/CO normally has two elements -consumption of domestic production from the country of origin and consumption of imported programmes to that country - which may influence a detailed calculation of an accurate T-C/CO, see below).

THE NATIONAL DIMENSION

T(n)-C is the Consumption of television in a specific country which is nationally distributed and have been produced outside the country under observation.
(T(n)-C may be measured in hours, as a share of total consumption of nationally distributed television or as a share of total consumption of television hours in the country. In principle T(n)-C also applies to a group of countries or specific groups of viewers.)
T(n)-C/CO is the Consumption of television in a specific country which is nationally distributed and have been imported from the designated Country of Origin.
(T(n)-C is the sum of T(n)-S/CO measures. T(n)-C/CO may be measured in hours, as a share of total consumption of nationally distributed television, as a share of all con-

sumption of imported, nationally distributed television hours[1] or as a share of total consumption in the country.

T(m)-C, the T(b)-C and the T(n)-C measures may be added to one T-C measure covering all transnationalization of consumption of television in the country (region or group) under observation. This is of course also true for a parallel T-C/CO measure.

A number of measures of transnationalization have been suggested above[2]. Depending on the unit of measurement most of them are addable. Some are rather fictional constructions others are relatively easy to administer. The exact choice of measures depends on the purpose of registering transnationalization. Generally it is important (1) to realize the diversity of ('first level') transnationalization effects of international television flows, (2) to be specific about the effects considered and (3) to agree on definitions and the operationalization of the effects.

SUMMARY

The proposed measures of transnationalization are summarized below. The next step is to look into the actual possibilities of producing these measures and to present a compilation and interpretation of existing empirical research according to the general framework suggested here. In doing so the basic problems of this study are also elucidated.

Summary of measures of transnationalization: see next page

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[1]Later this measure will be demonstrated to be unsuitable and often misleading.

[2]In research on international communications flows much attention has been given to the ownership of media capital. Also this object of transnationalization may benefit from the use of a parallel to the three dimensions of transnationalization inside the general framework suggested here. Beside that, it is necessary to develop a much more precise approach than applied so far, one of the main problems being to establish a relationship between 'second level' effects' and the media capital being 'multilateral', 'bilateral' or 'domestic'.

SUMMARY OF MEASURES OF TRANSNATIONALIZATION

OBJECT	Total transnationalization in country, region, or social group	Dimension of transnationalization		
		Multilaterally distributed television	Bilaterally distributed television	Nationally distributed television
SUPPLY	T-S	T(m)-S:1;2 T(m)-S/CO:1;2;3	T(b)-S:1;2 T(b)-S/CO:1;2;4	T(n)-S:1;2;5 T(n)-S/CO:1;2;5;6
CONSUMPTION	T-C	T(m)-C:1;2 T(m)-C/CO:1;2;3	T(b)-C:1;2 T(b)-C/CO:1;2;4	T(n)-C:1;2;5 T(n)-C/CO:1;2;5;6

1: hours; 2: share of total; 3: share of multilateral; 4: share of bilateral; 5: share of national; 6: share of imports.

Chapter 3

TRANSNATIONALIZATION OF TELEVISION IN EUROPE

This chapter serves the second main purpose of the study: to compile facts on international flows of television, focusing on West Europe *and* illustrates the use of the proposed framework including the possibilities of transforming existing data into the suggested measures of transnationalization.

To guide the presentation and interpretation of data one can transform the second main purpose of this study into three hypotheses. (1) that there is a substantial transnationalization of television supply and consumption in West Europe, (2) that television programmes from the USA have a significant role in this transnationalization and (3) that (1) and (2) are more pronounced in the small than in the big West European countries.

The idea of this section is thus to sort out existing data which are more than scattered examples and which can be transformed into the proposed measures of transnationalization to illuminate the three hypotheses.

TRANSNATIONALIZATION OF *SUPPLY* OF TELEVISION

THE MULTILATERAL DIMENSION: T(m)-S

It is almost impossible to report relevant data on multilaterally distributed television as supply in all countries changes fast and constantly. Most data are therefore obsolete at the time of publication in other media than the trade press.

The most elementary indication of supply of multilaterally distributed television is the sum of television hours technically available - which will of course be the same in all countries within reach of the satellites relaying this supply[1]. As an isolated observation this indicator is not very interesting but it is a necessary element in a more qualified measurement where hours broadcasted must be modified according to number of poten-

[1]This elementary 'truth' is undermined by the progressing information technology: today some channels are coded (pay) channels available in segmented areas only. Other channels individualize the length of schedule in individual countries depending on available channel capacity in cable networks.

tial receivers. Today in Europe this number for practical purposes is related to households connected to cable. However, this is a very simple indicator of T(m)-S since the capacity and the actual use of local cable nets vary heavily in and between countries. If interested in estimating T(m)-S it is necessary to gather detailed information from individual countries on actual cable traffic (available channels) and the number of hours delivered by these channels with a given mix of channel traffic[1]. It is not possible to find systematic, comparative, research generated information of this kind but only information of unknown origin in the trade press and news letters.

When expressing supply of multilaterally distributed television as a combination of programme hours and penetration, the multilateral dimension of transnationalization of television in West Europe was still insignificant at the end of 1988. However, if the forecasts of penetration of satellite television are fulfilled future attempts to register transnationalization of supply should include multilaterally distributed television.
The data asked for will be complicated to produce at a reliable level (and much more complicated than the parallel consumption data).

The few relevant data identified for this study on T(m)-S are reported in the section on transnationalization of consumption (see Tables 21 and 22) to take advantage of the possibility of comparing supply and consumption. In Table 16 (related to commercialization and transnationalization) relevant data can be found on T(m)-S/CO for two satellite channels.

THE BILATERAL DIMENSION: T(b)-S

Measuring T(b)-S involves most of the problems presented by T(m)-S measures. It is necessary to obtain data for the number of households or viewers in individual countries able to receive bilaterally distributed television and to use this as an indicator of T(m)-S or to relate these figures to channels and the supply from these channels.
There has never been a coordinated, international research approach to estimate this dimension of transnationalization of supply of television in West Europe. And again the necessary data will be complicated to produce (and again much more complicated than the parallel consumption data). Sporadic data, however, are available from several

[1]Note that channels may be perceived differently in different countries. For example, Super Channel, ostensible but not really represents transnationalization in Great Britain. British Screen Sport until recently definitely represented transnationalization in France. What does it do now that a French language sound track has been implemented?

countries but in most cases in the shape of percentages of households technically able to receive bilaterally distributed television which is at its best only an indicator of T(b)-S.

An international approach using this indicator is **The Television Guide**, 1986 (from Ogilvy & Mather, Europe). The background of these data are not described. From their 'face value' they support the hypothesis that - judged from reception possibilities - T(b)-S is relatively higher in the small West European countries - especially the centrally located ones - than in the larger countries. However, this may simply be a consequence of the absolute numbers of households in the countries under observation. More interestingly the data also indicate that the relationship between the big and the small countries is not reciprocal. In the relevant (border) areas the bilateral reception possibilities are always relatively higher in the small countries; also when the language is the same[1].
The available data on reception possibilities for bilaterally distributed television strongly suggest that for a realistic understanding of transnationalization of television supply, data on T(b)-S are much more important today than T(m)-S data. This section will not substantiate this assumption. The intention is only to point to the kind of data necessary to register T(b)-S. A demonstration of the importance of bilaterally distributed television for understanding transnationalization is found in the section on transnationalization of consumption of television .

THE NATIONAL DIMENSION: T(n)-S

The empirical research on international television flows has almost exclusively produced data that represent or can be processed to represent measures of transnationalization of nationally distributed television supply as defined in this study.

In this section priority has been given to compilation, re-calculation, presentation, and a certain re-evaluation of data according to the outlined framework. The idea is to report the essence of existing comprehensive and coherent data sets supplemented with basic information on the background of these data. Also the idea is overview and concentration on main features. This is basically what the quality of the data material allows for and a detailed review of the methodological quality of the data turned out not to add much further to the basic purposes of this study.

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[1]EBU's **International Comparison of Broadcast Statistics** each year reports the number of households able to receive what is here called bilaterally distributed television. Unfortunately, these data are considered confidential.

Even the condensed, streamlined version presented here of twenty-five years of empirical research has its amount of inaccuracies and inconsistencies. With few exceptions the methodological quality of the studies reviewed - including the level of background information and presentation of the results - is below the normal standards of social science research. The general methodological level, the lack of a consistent framework for interpretation and a relatively uncritical use seem to have built the case for some misinterpretations of international television flows and of the transnationalization of nationally distributed supply of West European television.

All data presented here are rounded off. Most of them have been re-calculated in some way to be presented according to the approach of this study. Divergences should be a product of the basic data. Those allowed in this presentation are not important and not pointed out.

Thirteen publications in the list of references present documented, coherent empirical data that are or can be made relevant to the national dimension of transnationalization of supply[1]. They cover the period from 1970/72 to 1986 to which this study adds new research covering 1984-87.

A longitudinal approach is tempting when all available data are presented in one place. Since, however, it is difficult to compare results from separate studies due to methodological problems, the chronological order in which data are presented should mainly be used to separate between historic data and more topical information.

In Annex 1 the studies behind the data to be presented are briefly introduced and characterized. Annex 1 also includes an overview of the empirical studies and the transnationalization measures which can be calculated from each study. Annex 2 is a short note on export data. In Annex 3 there is a more comprehensive presentation of background data related to the Tables 1-28 in this chapter.

Transnationalization of television supply in specific countries: T(n)-S

Table 1 presents the basic information from existing studies on T(n)-S calculated as imported hours as percentage of total national supply. Most of these data are mainly of historical interest. However, several of the studies have heavily influenced the present dominating understanding of international television flows. Also, from a research point of view it is still possible to learn from these studies.

Table 1: see next page

[1]Unfortunately, the best of all empirical studies on transnationalization of nationally distributed television (**Japanese Television**,1982) is not relevant to West Europe.

Table 1: Imported shares of supply of television hours in nineteen West European countries. 1970-87.

I(n)-S: % of supply

Reference:	Norden-streng and Varis (1974)	Chapman et al (1986)	NOU 1982:3	Mills (1985)	Mills (1985)	Pragnell (1985)	Varis (1985)	Sarkkinen (1984)	Schle-singer (1986)	Westrell (1987)	EBU (1986)	Television programming (1987)	This study	Interval	Latest information
Year:	70-72	77	77	80	81	82	83	83-84	83	85	85	86	84-87	70-87	-
Country															
Austria					29	34	43							29-43	43
Belgium				80[2]	37/28[3]	32	29							14-37	29
Cyprus						57								57	57
Denmark					40	38	46						34	31-46	34
W. Germany	27				19	19	18							18-27	18
Finland	40	43				37	37	39						37-43	39
France	9			9		14	17							7-17	17
G. Britain	13	26[1]			18/9[4]	16	15[6]		17[7]					13-26	16
Greece							39							39	39
Iceland	67						66							66-67	66
Ireland	54	72		58	58	57								54-57	57
Italy	13	16		19	17	12	18							11-18	18
Netherlands	23					30	25							23-30	25
Norway	39	42	38		38	41	30							30-42	30
Portugal	35						39							35-39	39
Spain	33				32		33							32-33	33
Sweden	24	38			55/37[5]		35							33-38	35
Switzerland					55									24-55	55
West Europe	24					33	30[8]			29	28	26[9]		57	30

From Table 10, 11, 24 and Annex, Tables 1, 2, 3, 4, 5, 6, 7.
1: ITV only.
2: One might expect that this figure also includes bilaterally distributed television. No information given in the source.
3: BRT/RTBF. An average cannot be calculated.
4: ITV/BBC. An average cannot be calculated.
5: SVT 1/SVT 2. An average cannot be calculated.
6: Channel 4 not included.
7: BBC only.
8: This figure is stated but not documented by Varis (1985). According to my calculations from Varis (1985), Table 6 and Figure 1 the result is 27%.
9: Public channels only.

Table 1 confirms that much uncertainty is involved in this kind of research even though it is impossible to separate this from developments in T(n)-S over time.
Though far from perfect, the last two columns in Table 1 give the best idea of T(n)-S available today. The picture is dominated by Varis (1985) but backed and qualified by the review of other relevant studies.[1]

If the countries in Table 1 are grouped into small and big countries the following pattern emerges which substantiates the general hypothesis on significant differences between small and big countries but also that the situation of the small countries vary widely:

T(n)-S: percentages of supply

Small Countries		**Big Countries**	
Netherlands.....	0-25%	W. Germany, France, G. Britain, Italy...	16-18%
Belgium, Denmark, Finland, Greece, Norway, Portugal, Sweden.....	26-40%	Spain.....	33%
Austria.....	41-50%		
Cyprus, Iceland, Ireland, Switzerland.....	> 50%		

Without going into a detailed discussion of determinants of transnationalization, the data in Table 1 seem to suggest that affluence and an independent language influence T(n)-S in the small country group. An independent language and a high per capita income suggest diminishing transnationalization (T(n)-S). If the language is shared with a big country it is very cost saving to import from that country. If all foreign products under all circumstances must be subtitled or dubbed the language factor is cost neutral as to what countries to import from.

[1]This includes the latest study which cover all of West Europe (**Television programming...**,1987). The data from this study are reported on a channel by channel basis but the data do not allow for the national accumulation used in Table 1.

The potentially most rewarding explanations of T(n)-S seems to be size of home market (related to the price of imported products), absolute resources available, degree of commercialization, supply of television hours per capita (including the number of channels and therefore the competitive situation), language and income. The need for considering a large number of explanatory factors is supported by the variation in T(n)-S from 25% to 66% between small countries - and a T(n)-S of a significant size in some of the big countries[1]. Under all circumstances it is too simplified to draw the conclusion (Breede,1985, page 222) that the Varis(1984) data point to size of country (independently of income) and geographical location as the most important determinants of transnationalization.

There are considerable differences between channels in both small and big countries. The original data on individual national channels suggest a higher transnationalization for channels carrying advertising than for channels without advertising income[2].

Table 1 shows an accumulated T(n)-S around 30% for West Europe . The only possibility for contrasting this average with other world regions is the study by Varis(1985) but unfortunately the data background for other regions than perhaps Eastern Europe and Canada[3] is so uncertain that such a comparison might be more misleading than informative.

The national background of transnationalization: T(n)-S/CO

T(n)-S represents the *quantity* of transnationalization whereas T(n)-S/CO reveals something on the nature or *quality* of transnationalization, namely the national background of the imported television hours. It is of course the data behind this measure of transnationalization which are the empirical background for the long established general thesis on big power (US) dominance and influence. Also it is the (supposed) knowledge of T(n)-S/CO which is behind the present West European concern with US influence - and thereby behind the EEC centred activities with the purpose of creating 'European independence' in the audio-visual industry.

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[1]It also must be remembered that T(n)-S in some countries reflects politically decided quotas. See information and discussions in Lealand(1984); Wiesand(1985), Schlesinger(1986) and **Toward a European...**,(1987).

[2]See the section "Transnationalization and commercialization" for further discussion of this hypothesis.

[3]T(n)-S for East Europe, exclusive of the USSR was 27% and for Canada 40% (Varis,1985, Table 6 and Figures 2 and 5).

Whether a T(n)-S or T(n)-S/CO is *too* high is a political issue. The role of research is to present the best possible unbiased facts on these phenomena to prevent action (or passiveness) on a false base.

Unfortunately, it is not possible to present the results on T(n)-S/CO as simple as the results on T(n)-S in Table 1.
Four major and seven supplementary studies have been identified from which information on T(n)-S/CO can be produced. (See the first page of Annex 1 for an overview). Below the results from these eleven studies (and new empirical research conducted as part of this study) are presented one by one in chronological order before attempting an overall conclusion. All information on background and methodology of the research reviewed is presented in Annex 1 in the same order as the studies are reviewed here.

Chapman et al(1986) from 1977

This publication from 1986 is a selected 'print' from a base of basic data from 1977. For this year it is possible to process the data into a relatively detailed picture of television imports to four small and two large European countries. The relevant data have been transformed to T(n)-S/CO measures in Annex 3, Table 2. A summary of the results is presented in Table 2 here.

Table 2: see next page

The data in Table 2 represent six weeks in 1977. In the two large countries (Great Britain and Italy) and the small English speaking, low income Ireland, 50% of imported television was from the USA. In the three affluent Nordic countries with independent languages, the US share of imports was modest and not larger than imports from 'other countries'.
Despite the high T(n)-S/USA in Great Britain (measured as percentage of imports), Norway, Sweden and Ireland broadcasted more *hours* of US produced television than Great Britain in the sample period. This illustrates the risk of the standard way of reporting on international television flows by presenting the volumes from each country as a percentage of total imports.

If one is interested in the ('second level') effects of imported television, the left half of Table 2 appears more rewarding (within the limitations of *supply* measures). Here it becomes obvious that US television only had a significant role in total supply in the coun-

Table 2: National background of imported television hours to six West European countries. 1977, six weeks.

Country	T(n)-S/CO % of total supply from Western Europe	USA	Others	All = T(n)-S	T(n)-S/CO % of total imports from Western Europe	USA	Others	All
Norway	26	7	9	42	62	16	22	100
Sweden	25	8	5	38	64	23	13	100
Finland	29	7	7	43	67	15	18	100
Ireland	35	31	6	72	49	43	8	100
Great Britain	3	14	9	26	11	55	34	100
Italy	7	8	1	16	46	49	5	100

From Chapman (1986), cf. Annex 3, Table 2 which specify twentyseven countries and regions of origin. See also this for further comments and details.

tries sharing the English language[1] and a substantial position only in Ireland. In the Nordic countries the US share of total supply was not higher than that of 'other' and only one third of the share of 'other European countries'.

Annex 3, Table 2, shows that the European share of supply to the three Nordic countries came from a *large* number of suppliers (12-15), dominated by Great Britain and other Nordic countries. And that Great Britain was a larger supplier of television to the Nordic countries than the USA. This is noteworthy since the language is the same and price differences probably were in the favour of US products. In my interpretation there is no substantiation of a general US dominance in these data.

The foreign element of Irish television was totally - and equally - dominated by the USA and Great Britain and much less nationally diversified than the imports to the Nordic countries. Income per capita and the language situation again appear to be reasonable explanations of these observations. Also the Irish decision to run *two* (commercial) channels must be considered when comparing the Irish situation to that of the Nordic countries. If there had been one channel only in Ireland and the same domestic production, T(n)-S would have been drastically smaller. One might suggest that Ireland was not the victim of US/British 'dominance' but a 'satisfied customer' which judged from its media policy accepted the high T(n)-S and T(n)- S/USA,GB.

Since the *example* of Ireland is both important and easy to misinterpret it should be stressed that I am not trying to say that we live in the best of all worlds where people get what they ask for. I am *not* talking about consumer preferences determining the situation (for one reason because we do not know the consumption pattern nor the viewer preferences). What I *am* talking about is a lack of domestic resources, the necessity for low costs, profit motives *and* supporting domestic political decisions leading - in the Irish case - to the highest T(n)-S in West Europe. At the same time I use the example to confront the routine perception of the USA as a kind of pervert which drags innocent and defendless West European countries into the US wasteland of television. May be too much attention focuses on perceiving the low cost, attractive US programmes as the enemy and too little attention is given to the economic, cultural and general policy of the receiving countries.

In Great Britain five countries beside the USA contributed - insignificantly - to total television supply. In Italian public service broadcasting the only significant foreign contribution was the T(n)-S/USA of 8% which certainly seems more important from a 'second level effect' and media policy point of view than the fact that US imports made up for close to half of the total Italian imports.

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[1]It is *important* to remember here and in all other tables that *figures on Italy* only include the public service broadcaster RAI and not the several private channels.

From a more global point of view, Table 2 shows that - 'the rest of the world' was represented significantly only in Norway and Sweden - and that this import in all six countries was totally dominated by 'developed' countries (Australia, Canada and East European countries).

NOU 1982:30 from 1977 and Mills(1985) from 1980

T(n)-S/CO for the full year of 1977 in Norway can be calculated from NOU 1982:30, see Annex 3, Table 3, which supports the data concerning Norway in Chapman et al (1986)[1]. Two thirds of Norwegian television output were domestically produced. The other Nordic countries together and the USA each contributed 7-8% of total supply, and other European countries 19%. Great Britain was the largest single supplier (11% of total output).

Mills(1985) - see Annex 3, Table 24 - reports the USA *share of imports* only and is therefore mentioned here mostly as a warning! Note also that compared to Table 1, and Annex 1, Tables 2, 4 and 5, there are remarkable discrepancies between Mills'(1985) semi official GEAR [2] data and other available data, cf. also the comments to the EBU data (Mills,1985 in Annex 1) questioning the information compiled by the statistical office of the European Broadcasting Union.

Pragnell(1985) from 1982

From Pragnell(1985) - reporting on sixteen West European countries for all of 1982 - it is possible to calculate T(n)-S/CO as a percentage of total *supply* as an alternative to the percentages of *import* reported by Pragnell(1985); see Table 3.
Pragnell(1985) mentions only briefly the methodology of the study. However, since the data cover a full year (and have been contributed by the broadcasting institutions) one may expect the results to be at the upper end of reliability in this area of empirical research.

Table 3: see next page

Table 3 shows that 55% of all imports to the fourteen countries (twenty channels) are from other European countries, 40% are from the USA and as little as 5% from the rest

[1]Chapman et al(1986) rely on a six weeks sample for 1977. Except for an underestimation of the share of British supply, the sample results are very close to the picture presented in Annex 3, Table 4.
[2]The Group of European Audience Researchers from EBU organized broadcasters.

Table 3: Share of supply of television hours imported from the USA and West Europe in fifteen West European countries. 1982.

Country	T(n)-S/CO % of total supply[1] from W. Europe	USA	Others	T(n)-S/CO % of imports[2] from W. Europe	USA	Others
Cyprus	28	29	0	49	51	0
Denmark	28	10	0	74	26	0
Finland[3]	25	10	2	67	27	6
France[3]	4	8	2	28	56	14
Great Britain	2	13	1	12	82	6
Ireland	26	30	2	45	52	3
Italy	5	6	1	41	49	8
Netherlands	11	13	6	37	43	20
Norway	32	7	2	77	17	5
Portugal[3]	19	13	5	52	35	13
Spain	12	21	0	36	64	0
Sweden	29	11	4	66	25	9
Switzerland[3]	36	3	0	92	8	0
West Gremany[3]	13	6	0	68	31	0
Total (W. Europe)	18	13	2	55	39	5

Calculated from Pragnell (1985, Table 3).

1: The sum of these figures corresponds to T(n)-S which together with the absolute figures on supply and import are found in Annex 3, Table 4.

2: The sum of these figures adds to 100% except for the deviations due to rounding off.

3: Three respondents (channels) in Switzerland, two in the others.

In Pragnell (1985) the data are reported for individual channels.

of the world. From the data reported by Pragnell(1985) in the right part of Table 3 it is near at hand to assign the USA a dominating role, especially if the US shares of imports are compared to the corresponding shares of *individual* West European countries. However, this is not possible from Pragnell´s own study which comprehends West Europe as one 'unit' parallel to the USA. This may be reasonable from an (EEC) political and economic point of view but not necessarily from a cultural effect point of view considering the cultural diversity of the West European countries.

As mentioned several times it is more relevant to study foreign countries' shares of total *supply* than their shares of imports. According to Table 3, T(n)-S/USA for all of West Europe was 13% in 1982 compared to 18% of supply coming from other West European countries.

Differences between countries follow the same pattern as identified in Table 2. In France, Italy and West Germany (big countries with independent languages) T(n)-S/USA was much below the average US share of supply for all of West Europe. Spain (low income) is much above average and (common language) Great Britain is at the average.

Among the *low income*, small countries, the T(n)-S/USA of Cyprus (independent language compared to the 'television nations') and Ireland (English language) is much above average, importing the same share of supply from the USA and West European countries. Portugal (independent language) was at the average but imported a higher share of supply from European countries than from the USA.

The T(n)-S/USA of the *high income* small countries (most of them with independent languages) are at or below the average and with the exception of the Netherlands they import a much higher share of total supply from West European countries than from the USA.

It is a personal or political decision whether these results represent a 'US problem' (as Pragnell,1985 suggests) in West Europe or not. In principle one might also from Table 3 talk about a 'West European problem'. But under all circumstances it is objectively wrong to talk about *one* common *West European* or EEC problem (cf. Pragnell,1985) since both T(n)-S; T(n)-S/USA and T(n)-S/W. Europe varied heavily among individual countries[1].

Unfortunately, there is no information in Pragnell(1985) on the intra-European flows of television. Pragnell (1985, page 25) briefly mentions that in two of the small countries

[1]As the Commission of the EEC is very active in opposing the (supposed) US influence on European television, one may observe - without opening here a discussion of the effects or 'proper' amounts of the US share of supply - that only Ireland and Spain among the EEC countries represented in Table 4 seem to have a 'problem'.

(Denmark and Norway) T(n)-S/UK > T(n)- S/USA which corresponds with the findings from Table 2.

Varis(1985) from 1983

From Varis(1985) - reporting on fourteen West European countries for one week in 1983 - Table 4 has been constructed to illustrate the major features of T(n)-S/CO for all West Europear. countries together. West Europe had a 73% degree of self-sufficiency in 1983 according to Table 4. The USA and the West European countries supplied the same share of accumulated imports to West European countries. Among the West European countries only three supplied more than 1% and among those only Great Britain was behind a substantial share.

Table 4: see next page

Varis(1984) has further details on T(n)-S/CO for individual West European countries. Unfortunately, only percentages of imports (and not supply) are reported and individual national data are not summarized. This way of reporting the results may be a contributing factor to what is here considered a common exaggerated interpretation from Varis(1985) of the role of US television in West Europe.

Fortunately, the absolute amount of imports can be found for each country in Varis(1984). From that it is possible to calculate the total supply for each country of origin and thus the T(n)-S/CO as a percentage of supply. The results of this procedure have been checked by combining the T(n)-S data and the distribution of imports over countries.

Below in Table 5 the data are concentrated and organized in a form comparable to the data from Pragnell(1985) reported in Table 3. The parallel data from Table 3 are shown in brackets. As pointed out above it is questionable to compare West Europe as a unit with the USA in the context of this study in spite of almost equal size of population and economic resources. It may make sense from an (EEC) political and economic trade balance point of view but not necessarily from a cultural point of view or from an ultimate interest in 'second level' effects. The detailed results of these calculations of T(n)-S/CO measured as percentages of supply for fourteen countries are presented in Annex 3, Tables 5 and 6.

Table 5: see next page

According to Table 5 the results from the two studies are amazingly identical when considering the slightly different cauterizations in Varis(1985) and Pragnell(1985) and the

Table 4: National background of supply of television hours in West Europe. 1983, two weeks.

Country of Origin	Supply - hours -	% of supply	Import - hours -	% of import
	T(W. Europe)-S/CO			
Domestic	3,014	73		
USA	525	13	525	44
Great Britain	192	5	192	16
W. Germany	83	2	83	7
France	60	1	60	5
Other W. Europe	95	2	95	8
		12		43
Eurovision	83	2	83	7
East Europe	36	1	36	3
Co-productions	48	1	48	4
Other countries	72	2	72	6
Total	4,129	102	1,194	100

Calculated from Varis (1985), Figure 4 and Table 12. Based on the fourteen countries specified in Tables 5 and 6. See Annex 3, Tables 5 and 6 for a specification of the data here for each of the fourteen countries.

Table 5: Share of supply of television hours imported from the USA and West European countries in fourteen countries. 1983, two weeks.

Country	T(n)-S/CO % of total supply from W. Europe	USA	Others	Co-productions & Eurovision	Total = T(n)-S
Austria	16	10	1	16	43
Belgium	16	8	2	2	29
Denmark	25(28)	12(10)	2(0)	0	46
Finland	19(25)	11(10)	3(2)	3	37
France	2(4)	10(8)	1(2)	3	17
Great Britain	1(2)	12(13)	1(1)	0	15
Iceland	39	19	0	7	66
Ireland	20(26)	34(30)	3(2)	0	57
Italy	8(5)	8(6)	2(1)	0	18
Netherlands	8(11)	9(13)	2(6)	6	25
Norway	14(32)	6(7)	5(2)	4	30
Spain	14(12)	16(21)	1(0)	2	33
Sweden	16(29)	9(11)	5(4)	5	35
W. Germany	5(13)	12(6)	0(0)	0	18

Calculated from Varis (1984 and 1985), cf. Annex 3, Table 5.
The sum of the first four coloumns should be identical to T(n)-S. Rounding offs create small deviations from the last coloum from Annex 3, Table 5.
For further notes, see Annex 3, Table 5.
The Data in brackets are from Table 3 (Pragnell, 1985).

very different samples used. The comments and conclusions on the US role in the supply of West European television based on Table 3 are reinforced by Varis(1985). This of course also holds for Table 6 showing the -less interesting - T(n)-S/CO measured as percentage of *imports*.

The detailed description of the intra-West European pattern of transnationalization in Annex 3, Tables 5 and 6, shows that

* The role of the Benelux countries is insignificant
* Two to five percent of supply in the small countries are of West German origin (except in the English speaking Ireland, whereas West German television products virtually are non-existent in the big countries
* The West German share of Austrian international television supply, the French share of Belgian national supply and the British share of Irish national supply - which might be expected to be high due to the shared language - were a minor element of transnationalization in the three small countries, probably because the bilaterally distributed supply in these small countries share languages with their big neighbours
* In West Germany, Great Britain and the small countries the role of French television is insignificant (except in the French speaking part of Belgium). The share of French television is a little higher in the two other Latin countries, Italy and Spain
* Great Britain is the dominating foreign West European supplier to most countries. The British share of supply is rather substantial in the small countries but insignificant in the large countries.
* The British share of supply is almost the same or bigger than that of the USA in Belgium, Denmark, Iceland, Norway and Sweden.

Table 6: see next page

Sarkkinen(1984) from 1983/84, Finland

The Finnish national broadcast institution regularly publishes programme statistics which to a large degree would provide sufficient information of transnationalization of nationally distributed supply if copied by all broadcasters. The latest report covers 1983/84. Annex 3, Table 7, illustrates in details the T(n)-S and T(n)-S/CO of a small West European country. The data support that the television supply in most small coun-

Table 6: Share of imports from the USA and West Europe in fourteen West European countries. 1983, two weeks.

	T(n)-S/CO % of imports[1] from			
Country	W. Europe	USA	Others	Co-productions & Eurovision[2]
Austria	37	23	3	37
Belgium	57	29	4	5
Denmark	57(74)	26(26)	5(0)	0
W. Germany	28(68)	64(31)	0(0)	0
Finland	40(67)	29(27)	9(6)	9
France	11(28)	58(56)	7(14)	18
Great Britain	13(12)	78(82)	5(6)	2
Iceland	60	29	0	10
Ireland	35(45)	59(52)	5(3)	0
Italy	41(41)	48(49)	11(8)	0
Netherlands	38(37)	34(43)	7(20)	21
Norway	46(77)	20(17)	18(5)	14
Spain	40(36)	33(64)	3(0)	9
Sweden	45(66)	25(25)	14(9)	14

From Varis (1985), cf. Annex 3, Table 6. (See this for notes).
1: Adds to 100%.
2: Not found in Pragnell (1985).
The data in brackets are from Table 3 (Pragnell, 1985).

tries appear to be more diverse and versatile as to cultural background than that of the larger countries[1].

Schlesinger(1986) from 1983, Great Britain

Schlesinger(1986, page 268) quotes research demonstrating that in 1983 the T(n)-S/USA in BBC1 peak time was 26% (and 9% on BBC2) compared to a total average for ITV and the two BBC channels together of 12% (see Table 1, Schlesinger,1986).
This detail is quoted here because it explains a kind of practical viewer experience contradicting the 'average oriented statistical reality' presented in this study. With BBC1 peak time in mind it is understandable if British viewers think of US programmes as taking up a large share of national broadcasting in spite of the overall statistics telling another story. And of course this (possible) discrepancy is one more argument for preferring consumption measures to supply measures.

EBU(1986) from 1986

As mentioned in Annex 1 (cf. Mills,1985) there are several problems with the EBU statistics - beside being confidential. However, from EBU(1986) it is possible to analyse the import to eight countries (fourteen channels) and pool these data to prevent violation of the confidentiality; see Table 7.

When Table 7 is compared to Table 4 (Varis,1985) it appears that the average T(n)-S for all West European countries is the same. The West European share of total supply is almost the same as that of the USA and 'Other'. Even considering the time lack and the slightly different categorization used in Tables 4 and 7 it is fair to interpret Table 7 as a confirmation of the general findings of Pragnell(1985) and Varis(1985).

Table 7: see next page

Denmark, 1984-87

T(n)-S/CO measures of Danish television supply from 1984-87 are shown in Table 8 based on research carried out in relation to this study. The data confirm the general findings in this section on small affluent West European countries with independent languages and the findings on Denmark specifically. The T(n)-S/USA (share of supply) is 9% which is probably less than T(n)-S/GB known to make up half of the 21% from

[1]Sarkkinen(1984) appears to offer an opportunity to test the reliability of the Varis (1985) study. However, from comments on the Finnish figures in Varis(1984) one might suspect that the Finnish figures have not been sampled like other data.

Table 7: Share of total supply and total imports of television hours from West Europe and the USA in eight West European countries. 1985.

	T(West Europe)-S/CO		
Country of Origin	Hours	% of total supply	% of import
EEC-countries	6,943	13	47
Other European countries	815	2	6
All of W. Europe	7,758	15	53
USA	5,751	11	39
Others	1,263	2	8
Total import	14,772	28 = T(n)-S	100

Calculated from EBU Statistics, 1986.
The countries and channels making up the importing 'West Europe' are: Denmark, Finland (2 channels), France (TF1), Ireland (2 channels), Norway, Great Britain (BBC and ITV), Spain (2 channels) and Sweden (2 channels).
Total supply (including repeats) were 52,078 hours.
Imported hours do not include repeats.

'other Europe' which it is not possible to specify on individual countries due to the character of the original data.

Table 8: see next page

Television programming in Europe 2 (1987) from 1986,West Europe

The latest international study from which transnationalization of supply can be calculated covers fourteen West European countries in 1986. The study reports no absolute figures. Therefore, it has not been possible to calculate T(n)-S on a country by country basis but for individual channels in each country only. See Table 9 which is a summary of Annex 3, Table 8 where data for individual West Europe countries are specified[1].

Table 9: see next page

Though a direct comparison to results on a national basis is difficult the observations reported so far appear to be supported by Table 9 in general and very clearly in the case of the accumulated West European figures.

Thus, Table 9 supports the observations on the levels on T(n)-S in individual countries, on the differences in T(n)-S between small and big countries and also the considerable amount of variation between countries *in* the these two groups. Table 9 also shows the distribution of supply in individual countries between domestic, West European and US productions and confirms the meagre representation of all 'other countries' and world regions outside West Europe and the USA.

Finally, Table 9 reveals significant differences in a number of countries between individual channels, differences which to some degree may be explained in the section "Transnationalization and commercialization".

Television programming in Europe..,(1987) allows for dissolving the aggregated data for West Europe on individual countries. These data are found in Annex 3, Table 8 which confirms the broader national plurality of the small countries compared to the big countries. Among the West European countries it also confirms the dominating role of Great Britain being represented with programming in twenty-one channels compared to France and Italy being represented with programmes on thirteen channels and West Germany on ten channels. Annex 3, Table 8 also confirms the modest role of pro-

[1]Since all other studies on transnationalization of supply of nationally distributed television referred to in this section are on terrestrial, national public channels only, the data on private channels, public satellite channels and regional channels in **Television programming...**,1987 are not included in Table 9, cf. the section "Transnationalization and commercialization".

Table 8: Share of total supply and total imports of television hours from Nordic countries, West European countries and the USA to Denmark. 1984-87, ten weeks.

CO: Country of Origin	T(n)-S/CO Hours	% of total supply	% of imports
Domestic	401	66	
Other Nordic countries	20	3	10
Other West European countries	126	21	60
USA	57	9	27
Other countries	6	1	3
All imports = T(n)-S	209	34	100
Total supply	610	100	

Background and methodology in Annex 1.

Table 9: Share of total supply and imports in twelve West European countries (twenty-six channels) from the USA, West Europe and other countries. 1986. One week.

T(n)-S/CO

Country/channel	% of total supply from					% of total imports from			
	Domestic	W. Europe	USA	Others	Total imports	W.Europe	USA	Others	Total
Austria									
FS1	68	21	8	3	32	66	25	9	100
FS2	53	19	23	5	47	40	49	11	100
Belgium									
BRT	81	6	10	3	19	32	53	15	100
RTBF	84	9	7	0	21				
Denmark									
DR	62	27	9	2	38	71	24	5	100
Finland									
YLE1	53	22	17	8	47	47	36	17	100
YLE2	55	29	11	5	45	65	24	11	100
France									
TF1	80	5	15	0	20	25	75	0	100
A2	91	3	5	1	9	33	56	11	100
FR3	80	9	11	0	20	45	55	0	100
Great Britain									
BBC-1	87	1	12	0	13	8	92	0	100
BBC-2	87	0	12	1	13	0	92	8	100
ITV	91	0	0	9	9	0	0	100	100
Channel 4	65	2	29	4	35	6	83	11	100
Italy									
RAI1	80	4	16	0	20	20	80	0	100
RAI2	72	9	19	0	28	32	68	0	100
RAI3	91	2	7	0	9				
Netherlands									
NL1	70	4	23	3	30	13	77	10	100
NL2	73	15	8	4	27	56	30	14	100
Norway									
NRK	63	19	15	3	37	51	41	8	100
Spain									
TVE1	82	4	12	2	18	22	67	11	100
TVE2	66	3	19	12	34	9	56	35	100
Sweden									
STV1	78	22	0	0	22	100	0	0	100
STV2	71	10	14	5	29	35	48	17	100
West Germany									
ARD	80	4	15	1	20	20	75	5	100
ZDF	86	6	7	1	14	43	50	7	100
Total	74	12	12	2	26	46	46	8	100

Calculated from Annex 3, Table 8, where data are listed for individual West European countries. (See also this for further notes).

grammes from the Nordic countries - which supply programmes to eight channels but only two outside the Nordic countries - and of the Benelux countries being represented on four channels of which three are outside the Benelux countries.
On a country by country basis, Annex 3, Table 8 suggests that the USA was the individual country with the highest representation of programmes on almost all channels. The only exception were Austrian FS1 (with a higher West German share), Danish DR with a higher Nordic share and Swedish STV1 with no US programmes at all. In the small countries, Belgium, Denmark, Finland and Norway the US share of supply was only slightly larger than that of Great Britain. In the big countries US programming typically was the only relatively significant foreign element.

Transnationalization and programme categories

A small step in the direction from supply measures to consumption measures (but still in the domain of supply measures) is the attempt by several researchers to analyse the transnationalization related to programme categories.
Considering the basic interest of this study in contributing to a solid basis for the study of 'second level' effects the relation between transnationalization ('first level' effect) and programme content might have been a natural starting point. Instead the reporting of data are arranged to have growing relevance for the ultimate interest ind 'second' level effects.
The cultural and media policy debate in West Europe in recent years have concentrated on the fear of what has been called "Wall-to-wall-Dallas", i.e., US fiction. A tentative (subjective) conclusion on the data reported so far is that *generally* speaking the fear of US influence on *total supply* of (public) television in West Europe seem quite exaggerated. However, this *may* be a relatively uninteresting observation from a 'second level' effects point of view. A further necessary step is to look into available data on the transnationalization of different categories of programme content.

The most detailed description of transnationalization of different programme categories is **Chapman et al**(1986). However, the findings are *so* detailed that it is a comprehensive project of its own to process the data into something which can be understood and compared to other research; also taking into account that the data are from 1977 no attempt has been made to do this.

Pragnell (1986, Table 4) reports on T(n)-S/USA and T(n)- S/other-foreign for four programme categories (not explained) but in such a way that it is impossible to tell whether for example a high T(n)-S/USA in a programme category is due to the relative

importance of the category in total supply or to a high import from the USA in this category. Anyhow, the findings indicate that T(n)-S is much higher in the category 'drama' than in the categories 'children', 'factual' and 'other'.

Since it is important for the understanding of transnationalization the imported shares of 'drama' reported by Pragnell(1985) have been calculated here to be comparable to the observations in Table 3. Table 10 demonstrates that transnationalization was significantly higher in the 'drama' category than in total supply.

T(n)-S,drama was 77% (compared to T(n)-S = 33%) in the countries included in Table 10. There are some variations between countries but generally drama was highly transnationalized and the USA had a very significant role in this transnationalization which was the very base of the import of US programmes to West European television reported by Pragnell(1985). T(n)-S/USA,drama was two to four times higher than T(n)-S/USA in the seven countries. Pragnell(1985, page 27) concludes that "...the USA occupy a powerful place in the presentation of dramatic material on European scenes."

Table 10: see next page

Knowing that drama is a popular category among the audiences, it appears more relevant to discuss media policy measures related to drama programmes than to other programme categories. But the role of US programmes still appear to be nationally specific and not a general *West European* "problem" as suggested by Pragnell(1985, page 27).

In Table 11, T(n)-S/USA,drama has been divided into T(n)-S/USA,cinema-films and T(n)-S/USA,other-drama. One might interpret the data as the US position in West European supply of television drama being an extrapolation of the well known dominant role of the US film industry in Europe since the 1950:s.

Table 11: see next page

The data from **Varis**(1985) on transnationalization related to programme categories are condensed in Table 12 which clearly supports that entertainment dominates the international television flows (cf. also the same observation reported by Nordenstreng and Varis,1974).

Transnationalization of 'entertainment' supply was higher than transnationalization of total supply in all countries represented in Table 12. Knowing that between one and two thirds of total output were 'entertainment' in these countries (Annex 3, Table 10) this programme category obviously is 'responsible' for most of the total transnationalization.

Transnationalization of the programme categories 'informational', 'educational' and 'cultural' was much lower than total transnationalization especially transnationalization

Table 10: Share of drama programming hours produced domestically and imported from the USA and 'other countries' in seven West European countries. 1982.

Country	T(n)-S/CO, drama CO: USA % of total supply	USA % of drama supply	Other foreign % of total supply	Other foreign % of drama supply	Domestic supply % of total supply	Domestic supply % of drama supply
Denmark	10	24	28	29	62	48
Finland	10	20	27	53	63	27
Great Britain	13	55	3	5	84	40
Netherlands	13	52	17	38		10
Norway	7	32	34	63	59	5
Portugal	13	50	24	41	63	9
Sweden	11	32	33	47	56	21
7 countries	13	44	20	33	67	23

Calculated from Pragnell (1985), Tables 3, 4a and 4b.
Domestic percentage of total supply from Table 3 here.
For details and background data, see Annex 3, Table 9.

Table 11: USA share of cinema film and 'other drama' hours in six West European countries. 1982.

Country	T(n)-S/USA, drama % of supply		
	Cinema films	Other drama	Drama total
Denmark	43	15	24
Finland	37	12	20
Great Britain	65	43	55
Norway	54	26	32
Portugal	63	37	50
Sweden	49	25	32

From Pragnell (1985), Table 3 and Table 10 here.

of the second largest category in total supply, 'informational' programming. The transnationalization of supply of 'children's' were on or above total transnationalization which in most discussions seems to be a neglected observation compared to the high transnationalization of the entertainment category.
Table 12 clearly demonstrates that the T(n)-S of total supply covers many deviations as to content categories which is important for the 'second level' effects - and thereby for media policy considerations.
Table 12 also indicates that except for entertainment T(n)-S was higher for small countries sharing a language with larger countries than for other countries[1] which again indicates the mistake of perceiving West Europe as one unit sharing the same problems.

Table 12: see next page

From Varis(1985, Tables 11 and 23) it is possible to calculate T(n)-S/CO related to programme categories. Unfortunately, the absolute data necessary to calculate this transnationalization as 'percentage of supply' is not provided. Therefore Annex 3, Table 11, only provides the less informative 'percentage of import'. As pointed out several times these measures must be interpreted carefully. However, Annex 3, Table 11, does seem to support the conclusions made from Pragnell(1985), i.e., that the USA is the dominating contributor to transnationalization of 'entertainment' in almost all West European countries.

Sarkkinen (1985), also breaks down imported supply of Finnish television by programme categories (Appendix, Tables 1-12, Sarkkinen,1985). Approximately 25% of imported hours were serials. Feature films accounted for another 25% and documentary programmes for further 20%. Children's programming made up approximately 10%.

From the quantatively and qualatively *limited* research on transnationalization of programme categories the most certain conclusions are (1) a very diverse situation between countries, except for the facts
(2) that fiction in general has the highest transnationalization of all programme categories, (3) that the US element of transnationalization is heavily concentrated in this category, (4) that US programmes therefore in a number of countries play a conspicuous role in the supply of 'fiction', perhaps especially during peak hours, and (5) a potential underestimation (due to measure problems) of transnationalization of

[1]Remember that Sweden is the largest country among the four Nordic countries and that the three Scandinavian countries to some degree share languages and to a high degree cultural background.

Table 12: Imported shares of supply of television hours in five programme categories in eighteen West European channels. 1983, two weeks.

Country	T(n)-S, programme categories % of supply					
	Informa-tional	Educatio-nal	Cultural	Childrens	Enter-tainment	Total
Austria	8	2	26	35	77	43
Belgium (BRT)	4	<1	27	33	63	28
Belgium (BRTF)	6	<1	30	30	49	29
Denmark	<1	14	15	43	68	43
Finland	16	30	<1	30	56	37
France	<1	<1	<1	34	40	17
Great Britain BBC	<1	<1	6	9	37	15
Great Britain ZTV	<1	<1	<1	10	30	14
Great Britain Ch.4	<1	<1	<1	<1	48	26
Iceland	38	100	<1	36	91	66
Ireland	11	38	28	52	78	57
Italy	2	36	14	38	31	12
Netherlands	15	<1	2	55	42	25
Norway	5	16	25	43	46	30
Spain	14	7	20	51	57	33
Sweden	14		<1	32	53	35
W.Germany ARD	2	<1	<1	20	22	13
W.Germany ZDF	2	14	13	38	37	23

From Varis (1985), Table 11.
It is not possible to calculate one measure for the countries represented by several channels. In other countries than Belgium, Great Britain and West Germany with more than one channel the source does not specify which channel the data relate to.
Programme categories' shares of total supply and absolute figures are listed in Annex 3, Table 10.

'news/informational' categories. Such programmes are normally registered as domestic in spite of many elements coming from a (limited) number of foreign sources.
A quite different but important observation is that the categorization of programmes appears to be rather superficial and 'production statistics oriented' which limits the value of these data compared to a more consumption oriented approach to programme categorization.
Anyhow, there is no doubt that even though the quantity and quality of documentation is limited the results point toward a central element for understanding the nature of transnationalization and its implications for 'second level' effects[1].

To supplement the scarce existing research I have applied the 'programme statistics' approach and calculated T(n)-S/CO for the categories used in Denmark's Radio's programme statistics.
Representing a small West European country, Table 13 confirms the previous observations. The 'factual' category made up 41% of the total supply of which 11% were imported. 90% of this import was from West European countries. 22% of total supply was 'drama' of which 81% were imported, one third coming from the USA which is less than the import from other West European countries. The data do not allow for a specification of 'other West Europe' but it is known that Great Britain dominates this import.The T(n)-S of the total supply came primarily from feature films, series and sports programmes (including Danish sports activities in foreign countries).

Table 13: see next page

Television programming...(1987) has data on the relative share of programme categories for all channels but unfortunately programme categories are not related to transnationalization, i.e., the import data of the study. In principle it is possible from the study to investigate potential correlations between T(n)-S and T(n)-S/CO and the relative share of different programme categories of the supply. However interesting that may be it will not illuminate the object of interest here, i.e., the degree of transnationalization of individual programme categories.

[1]Westrell(1987) specifies T(n)-S for ten programme categories in Sweden in 1985. For practical reasons these data are found in Table 21 where they are integrated with and compared to the T(m)-S of the same programme categories. Considering the character of these data they do not alter the conclusion here.

Table 13: Imported shares of supply of television hours in five programme categories in Denmark. 1984-87, ten weeks.

Programme category	T(n)-S/CO % of total supply from					Total supply	
	Nordic countries	Other European countries	USA	Total import	Domestic	Minutes	%
Factual	2	8	1	11	89	15,031	100
Sports	4	45	8	57	43	5,506	100
Drama[1)]	1	42	32	81	19	8,014	100
Music entertainment[2)]	2	8	4	14	86	5,590	100
Other	0	0	0	0	100	2,125	100
Total supply[3)]	3	21	9	34	66	36,266	100

Background and methodology in Annex 1.
1: Theatrical film, TV-films, series and serials.
2: Shows, quizzes
3: From Table 8 compared to which 'others' are excluded due to the little share of total supply.

Transnationalization and time of day

Another step in the direction from supply measures toward consumption oriented measures is the analysis of transnationalization of television supply at different times of the day which are known to be related to size and character of the audience.

Chapman et al(1986) carries a voluminous material on T(n)-S during the day. The results of processing this material are presented in some detail in Annex 3, Table 12, and summarized in Table 14 here. Obviously T(n)-S varies highly during the day but it seems impossible to find any general pattern across countries in Table 14.

Table 14: see next page

Pragnell(1985) reports to have gathered data for T(n)-S in peak time (not defined) from half the respondents (fourteen channels). The data are not published but Pragnell(1985, page 26) states that "Among those who did <supply information on peak time> no uniform pattern was visible; some showed less than a due proportion in peak time and some more while in other areas there was broad equivalence in the proportions in the two time bands."

Varis(1985) distinguishes between T(n)-S of all programming and T(n)-S in 'prime time' (with no definition of this concept) but has no comments to the differences which seem to be smaller than those observed by Pragnell(1985) . However, the conclusion appears to be the same. (See Annex 3, Table 13).

Schlesinger(1986) found T(n)-S for all hours in 1983 to be 17% for BBC1 and 16% for BBC2 and the corresponding figures in peak time (not defined) to be 31% and 22%.

Television programming...,(1987) specifies transnationalization for all hours and for prime time only (6.30-10.30 pm). The detailed results are in Annex 3, Table 8 which again shows a rather confusing picture (at least when no other variables are included).
For twelve of the twenty-six channels transnationalization is *higher* in prime time than for all hours and for thirteen channels it is *less* than for all hours. In many cases the differences are small and (probably) not significant.
The twelve channels with higher transnationalization in prime time are equally divided between small and big countries. Nine of the channels carry commercials. In thirteen of the channels T(n)-S/USA is higher in prime time than for all hours. Ten of these channels operate in big countries.

Table 14: Imported shares in six West European countries of supply of television hours in seven time bands. 1977, six weeks.

	T(n)-S, time of day % imported of total supply in					
Time of day	Norway	Sweden	Finland	Ireland	Great Britain	Italy
6-7 pm	38	54	27	67	7	16
7-8 pm	19	49	47	79	20	27
8-9 pm	31	52	51	65	45	10
9-10 pm	62	63	28	63	29	28
10-11 pm	77	38	71	77	12	25
6-11 pm	44		43	70	22	21
All hours	42	36	39	72	22	14

Calculated from Chapman et al (1986), vol. 2-4. Summary of Annex 3, Table 12. See this for comments.

This study indicates that there may be some factors guiding transnationalization in different time bands. As one example it appears that big countries and advertising financed channels concentrate (US) imports in prime time but no general 'rules' can be established.

The only possible conclusion from existing empirical research on the relation between T(n)-S and time of day seems to be that no general relation can be identified across countries and that there are very big differences between countries.

Denmark, 1984-87. The study on transnationalization of Danish television also analysed the relation between time of day and transnationalization of supply. The data in Table 15 show a slight difference between 'before 7.30 pm' and 'after 7.30 pm' (peak time), the last period having the lowest transnationalization.
In the reports by Chapman et al(1986), Pragnell(1985), Varis(1985) and **Television Programming...**,(1987) it is not possible to compare 'peak time' and 'before peak time' because peak time is compared to all hours. This may explain some of the difficulties of identifying any quiding principles. Calculation of T(n)-S/CO in each of the two time bands offers a better understanding. In the Danish study total transnationalization was almost the same in the two time bands but the national background changed. The US share doubled at the expense of 'other Europe' after 7.30 pm[1]. This indicates that the US share of consumption is bigger than that of supply since the ratings go up after 7.30, cf. the section below on transnationalization of consumption.

Table 15: see next page

Transnationalization and commercialization

Commercialization is defined here as consisting of one of two elements. The first element is the presence or absence of a profit motive leading to the distinction between public service broadcasting (no profit motive[2]) and private broadcasting (with a profit motive and therefore by definition commercial). The second element is the presence or absence of advertising income. Public service channels with advertising according to this conceptualization are commercial. Public service channels with no advertising are not commercial. (For the purpose here 'sponsoring' is included in the concept of advertising). This conceptualization of 'commercial' is illustrated below.

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[1]The big differences between the results in Table 15 and the Danish data in Annex 3, Table 8 may illustrate the consequences of the two different approaches to studying transnationalization of prime time.

[2]See the chapter "Background" for further elements in the concept of public service broadcasting.

Table 15: Imported shares in Denmark of supply of television hours in two time bands from Nordic countries, other West European countries and the USA. 1984-87. Ten weeks.

Country of Origin	I(n)-S and I(n)-S/CO % of supply					
	All hours		After 7.30 pm		Before 7.30	
	Minutes	%	Minutes	%	Minutes	%
Denmark	24,060	66	11,080	64	12,980	58
Other Nordic Countries	1,200	3	650	4	550	2
Other European Countries	7,560	21	3,240	17	7,320	33
USA	3,420	9	2,160	12	1,260	6
Other countries	360	1	180	10	180	1
All imports (I(n)-S)	12,540	34	6,230	34	9,310	42
Total	36,600	100	17,310	100	22,290	100

Background and methodology in Annex 3.

	Advertising income	No advertising income
Profit goal	Private commercial broadcasters	Private commercial pay-tv broadcasters
No profit goal	Commercial public service broadcasters	Non-commercial public service broadcasters

From **Television programming...**,(1987) it is possible to relate transnationalization of supply to these categories of broadcasters (except private pay-tv channels), see Table 16[1].

Table 16: see next page

When focusing on *total* supply the much discussed US influence on West European television supply is closely related to (terrestrial) private channels (and according to the source of Table 16, particularly to the Italian private channels). This of course has serious implications for both the national and the West European (EEC) media policy concerning transnationalization of national supply of television and especially the US influence.

Table 16 also indicates the possibility that commercialization of public service channels influences the role played by the US programming in total national supply which of course also must be noticed politically when discussing the potential necessity and possibility of reducing the US share of national supply.

The data behind Table 16 call for the highest degree of carefulness but it *is* tempting from Table 16 at least to set up the hypothesis that transnationalization is strongly correlated with private versus public ownership (presence or absence of profit goals) that the dependence of public service broadcasting and advertising income is correlated with the share of supply of US programmes[2].

Television programming...,(1987) also allows for a hypothesis on a strong correlation between broadcaster categories and the share of entertainment-based programme supply in prime time, see Table 17 which also indicates that the role of entertainment programming is strongly correlated with profit goals and probably with public service

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[1]As for the public service channels in Annex 3, Table 8, it is possible from **Television programming...**,(1987) to specify the shares from individual West European and 'other' countries of the supply of private channels. However, this is not included in Table 16 or in Annex 3, Table 8 because of the small shares, the nature of the original data and the focus of this study on public service broadcasting.

[2]For further empirical support, see Schrape(1987), Table 2.

Table 16: National background of supply of television hours related to commercialization.
Share of supply in fourty-one channels in thirteen West European countries and two Pan-European channels from the USA, W. Europe and other countries. 1986. One week.

Country of origin	% of total supply Non-commercial public service channels[1] T(n)-S/CO	Commercial public service channels[2] T(n)-S/CO	Terrestial private commercial channels[3] T(n)-S/CO	Satellite private commercial channels[4] T(m)-S/CO	All channels
Domestic	75	72	43	58[5]	66
USA	10	15	47	22	20
W. Europe	13	11	8	14	11
Others	2	2	2	6	3
Total Imports	T(n)-S: 25	T(n)-S: 28	T(n)-S: 57	T(m)-S: 42	34
Total supply	100	100	100	100	100

From Television programming..., 1987, page 16 (no absolute figures available). T(n) and T(m) refer to the group of individual countries where the supply from the aggregated channels is received. Classification of channels according to the source which use the term 'state owned' and not 'public service'.

1: Nine channels: RTBF; BR1; DR; NRK; SIV1; SIV2; BBC1; BBC2 and the satellite delivered 3-sat which due to the nature of reporting in the source cannot be separated from the terrestial channels as a parallel to the reporting of private commercial channels.

2: Twenty-one channels: FS1; FS2; YLE1; YLE2; TF1; A2; FR3; ARD; ZDF; RAI1; RAI2; RAI3; NL1; NL2; TVE1; TVE2 and the five regional channels ETB; TVG (Spain); TSR; DRS and TST (Switzerland) which due to the nature of reporting in the source cannot be separated from the nationally distributed channels as in Table 9.

3: Nine channels: RTL Canal Plus (pay channel); RTL Plus; RETE4; Canal 5; Italia 1; Teleclub (pay channel); ITV and Channel 4.

4: Three channels: SAT-1 (W.Germany); Sky Channel and Music Box (G. Britain).

5: Production from the up-link countries.

channels being advertising financed or not - which of course also has implications for media policy issues.

Table 17: see next page

Parallel findings to those in Table 17 on the relationship between programme content and commercialization are reported in a number of other studies[1]. Neither these studies or Table 17 relate these findings to transnationalization. However, in **Television programming...**,(1987) the commercialization dimension has been related to both transnationalization and the role of the entertainment programme category in the same data material. Unfortunately, the published data do not allow for formal statistical analysis but there seems to be a clear parallel between the correlations of commercialization and entertainment programming and commercialization and transnationalization.

At the least this means that when trying to understand transnationalization and especially the US role as a 'first level' effect in West Europe it is important to incorporate the priority given to entertainment programming in commercial competition since it is in this programme category US produced programmes constitute a very substantial share of global programming.

Moving a step further one might see transnationalization of West European television supply (and especially the US role) as much - or more - as a consequence of the priority given to commercialization in West European media policy as a consequence of a US attempt to penetrate the West European television market though it goes without saying that the two elements are very difficult to separate. Evidently this hypothesis is very important for media policy considerations.

CONCLUSION ON THE TRANSNATIONALIZATION OF SUPPLY OF TELEVISION

Based on the review of available empirical research on transnationalization of supply of television in Western Europe I find it reasonable to conclude that:

* The empirical research on transnationalization - or 'first level' effects of international television flows - is limited and not very reliable. There have been serious problems in the collecting and reporting of data; imports and not total supply have

[1]Empirical evidence may *for example* be found in Pragnell(1985); Blumler et al(1986); Krüger(1986 and 1988); Sarkkinen(1986).

Table 17: Share of entertainment programme hours in prime time related to commercialization in fourty-one channels in thirteen West European countries and two Pan-European channels. 1986. One week.

Entertainment hours as % of prime time supply			
Non commercial public service channels[1]	Commercial public service channels[2]	Terrestial private commercial channels[3]	Satellite private commerical channels[4]
46	52	86	88

From Television programming..., 1987, page 10 (no absolute figures available).
For notes 1 to 4, see Table 16.

been the traditional basis of analysis; the applications and quotations of existing data have been relatively superficial.

* Transnationalization has primarily been understood as share of *imports* from individual countries. It is therefore understandable that - presupposing an effect - the subjective interpretations of the few findings have found an 'undue', i.e., number one position of US produced television in West European supply. Together with other methodological problems this has in my interpretation lead to an exaggerated perception of the *general* role of US television in West Europe.

* The dominating paradigm among researchers and politicians that West Europe is dominated by US produced television is *generally* not very well supported by hard data, especially not when the imports are related to total supply and not total imports. For example there seems to be very little culturally oriented rationale for the EEC intentions to reduce the US share of public service supply. From an economic point of view imports from other West European countries are higher in West Europe as one unit than from the USA. US television has a minor role compared to West European produced television - also in the small countries though there are large differences between the self sufficiency of small and big countries.

* It is necessary to be *very* careful with generalizations on 'West European' or 'small West European' and 'large West European' countries. Transnationalization depends on income per capita, total resources, whether the countries share a language with one of the large 'TV nations', with the national 'output ambitions' and the degree of commercial activity allowed for. There is no such thing as a *West European* situation or *West European* problems and no general solutions.

* The television supply of small countries with few exceptions have a more versatile national background compared to the almost chauvinistic concentration on one's own language and culture in the big countries.

* The - little - available research on transnationalization of programme categories indicate that transnationalization and the US influence or share of West European television supply may be modest totally but not in individual programme categories. The imports from the USA are almost totally concentrated on 'fiction'. If the US share of supply is 'critical' (compared to any measure of effects) it must be in this programme category. This observation is important for 'second level' ef-

fects and indicates a higher (US) transnationalization of consumption than of supply.
Children´s programming may be another highly transnationalized programme category which again has serious implications for (the study of) 'second level' effects. Another *possibility* for a false impression from describing the US share of *total* West European television supply is the possibility of the US imports being concentrated in prime time.

* There are strong indications that both total transnationalization and especially T(n)-S/USA are strongly correlated to the dimensions of commercialization. The more commercialization, the more (US) imports and concentration of this import in prime time. The differences on T(n)-S and T(n)-S/USA between non-commercial public service channels and terrestrial private commercial channels are enormous - confirming the hopeless task of dealing with West European television in this aspect as a homogeneous unit.

* The technological development is expected to add to the supply of multilaterally and bilaterally distributed television (and private broadcasters) and thereby to transnationalization of total television supply. There is no doubt that these two dimensions of transnationalization (and private broadcasters) must be included separately in future studies of international television flows (at least in West Europe). It is not possible to tell how existing and expected development of local television is related to transnationalization. But probably this element of supply cannot be neglected in the future and probably it will reduce total transnationalization.

* As a 'first level' effect of international television flows, transnationalization of supply is not a very interesting independent variable when it comes to discussing the 'second level' effects of transnationalization.
Related to the total output of television in a country there is no doubt that total transnationalization of supply is and will be increasing due to growing amounts of bilaterally and multilaterally distributed television (and probably also due to transnationalization of the nationally distributed supply related to increasing commercialization). But from a cultural point of view and from a media policy point of view this is only interesting if related to transnationalization of *consumption.*

* Both from an industry point of view and from a cultural (media policy) point of view there is a need for internationally coordinated, standardized studies on transnationalization of supply, incorporating all three dimensions of transnational-

ization. Existing research results are too old and/or too unreliable to create an informed basis for any decisions. However, knowledge of transnationalization of consumption is more important and supply is very difficult to measure satisfactorily as the electronic media output keep growing - but the ideal situation would be to be able to compare supply and consumption.

TRANSNATIONALIZATION OF *CONSUMPTION* OF TELEVISION

Several researchers (e.g. Nordenstreng and Varis,1977; Read,1976; Tunstall,1977; Lealand,1984; Tracey,1985) have pointed out the need to investigate the transnationalization of international television flows from a consumption perspective as an alternative or supplement to the supply data. However, empirical research on transnationalization of consumption is *very* limited.

This section has three purposes: The *first purpose* is to illustrate the kind of data and research approaches which are necessary to develop the measures of transnationalization of consumption of multilaterally and bilaterally distributed television. This is carried out by presentation of some *examples* of relevant research. The *second purpose* is to review the internationally published data on transnationalization of consumption of nationally distributed television. The *third purpose* is to offer some first insight into the relation between transnationalization of supply and consumption based on existing Swedish research and a new empirical investigation carried out as part of this study.

THE MULTILATERAL DIMENSION: T(m)-C

In the section on T(m)-S it was assumed that supply of multilaterally distributed television in most countries still plays an insignificant role which, however, is expected to grow in the years to come. Future approaches to measuring transnationalization of consumption of television should therefore include (Tm)-C measures to be able to follow whether the increased supply is reflected in consumption. A few examples of relevant *approaches* which might be an inspiration for future national studies are therefore presented here. The exact results of the individual studies reported are less interesting - and most likely outdated due to the fast changing consumption situation.

Transnationalization of consumption must be measured in *units of time* to be able to compare the shares of the three dimensions and to be able to produce *one* measure of

transnationalization of consumption (T-C) by adding T(m)-C, T(b)-C and T(n)-C. Measures as 'percentages of households watching per period' or 'watching at the least once a week' are not operational - except for comparing the relative consumption activity of different groups of viewers[1].

An example of integrating T(m)-C (and T(b)-C) measures into traditional, national audience research is found in Table 18 which constitutes an ideal example of a national approach to measure transnationalization of television consumption. To reach a measure of *total* transnationalization of television consumption in Norway, T(n)-C, (which is unknown) should be added to T(m)-C and T(b)-C[2].

Table 18: see next page

One way of evaluating the influence of multilaterally distributed television on total consumption is to compare groups with and without access to multilaterally distributed television.

An example of this approach is an investigation of two cabled cities in Sweden in 1985 (Westrell,1986). In Borlänge with access to French based TV5, British based Music Box (now closed down) and British based Sky Channel weekly television consumption was 135 minutes compared to a Swedish average of 115 minutes in the same week. Of the 135 minutes, 33% were multilaterally distributed television. This supports the hypothesis that where multinationally distributed television is available transnationalization of consumption cannot be understood if neglecting T(m)-C.

In this study total television consumption was 17% higher in cabled than non-cabled households. Consumption of nationally distributed television decreased in the cabled areas with 26%. T(m)-C varied significantly among age groups, see Table 19. This observation is supported by Findahl(1986)[3] reporting T(m)-C based on Sky Channel in the Netherlands in 1984 to be 14% in age group 12-70 years, 30% among 12-24 years old and 37% between 15-19 years old.

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[1]Such measures are for example found in Sky Channel(1986); Hedman et al(1986); Nordström(1987); Thomas et al(1987). Sky Channel(1986) also reports some results in time units. Due to the methodology of the study the results are not quoted but it interesting to note that total consumption is divided in "domestic", "satellites" and "spill-in:s" paralleling T(n)-C; T(m)-C and T(b)-C.

[2]In West Germany the communication journal **Media Perspektiven** regularly publishes viewing data measured in minutes and related to the national channels and available satellite channels for *cabled* homes.

[3]From **Onderzoek inzake het kijken naar Sky channel**, NOS/STER, Hilversum, 1986. The data are from telephone interviews of a representative sample of cable subscribers able to receive Sky Channel.

Table 18: Consumption in Norway of multilaterally, bilaterally, and nationally distributed television hours. 1985, one week.

Form of distribution	T(m)-C and T(b)-C	
	- minutes -	% of total consumption
Nationally distributed television	98	88
Bilaterally distributed television	6	5 = T(b)-C
Multilaterally distributed television	3	3 = T(m)-C
(Video	5	4)
Total	112	100

From Haraldsen et al (1985), Table 2.
Based on personal interviews of a nationally representative sample, age 9-79 years.

Table 19: see next page

The other cabled city, Kalmar, (Westrell,1986) received Sky Channel, Music Box and Soviet Horizont. These data allow for a comparison of supply and consumption. Table 20 shows that T(m)-S may be a poor indicator of T(m)-C and thereby supports the necessity of using consumption measures as the 'first level' effect variable. According to Table 20, T(m)-S was 74% and the weekly average of T(m)-C was 30% with the highest transnationalization of consumption during weekends (Westrell,1986).

Table 20: see next page

Programme categories

Westrell(1987) reports on both supply and consumption of nationally and multilaterally distributed television related to programme categories in the Borlänge area in 1985[1].

Annex 3, Table 14 presents data on ten programme categories, on total supply of domestically produced and nationally distributed television hours, and on foreignly produced and nationally distributed hours. Annex 3, Table 14 illustrates the dominant position in *total* supply of multilaterally distributed 'fiction' programmes.

Annex 3, Table 15 shows very large differences between transnationalization of supply and the corresponding consumption in favour of nationally distributed television, especially domestically produced programmes. To some extent 'fiction' and 'theatrical movies' are exceptions to this pattern.

In Tables 21 and 22 the data have been recalculated and 'translated´ into the measures suggested in this study. The two tables provide an opportunity to compare transnationalization of supply *and* consumption of nationally and multilaterally distributed television.

Table 21 shows the supply data. The first two columns on T(n)-S and programme categories support the general conclusions in the section "Transnationalization and programme categories".

It is obvious that T(m)-S as a percentage of supply is merely a function of the many hours of multilaterally distributed hours. Anyhow, Table 21 does demonstrate that with two national channels and just three satellite channels available more than two thirds of the supply of television to cabled households in a small country consisted of foreignly produced programmes.

In non-cabled households with access to two nationally distributed television channels only a little less than one third of total supply was foreignly produced. The data on

[1]Transnationalization of consumption of nationally distributed television is covered in a later section but for the sake of presentation the T(n)-C data are included here.

Table 19: Age groups and consumption of satellite television in Sweden as percentage of total television consumption in cabled homes. 1985, one week.

Age	T(m)-C % of total consumption
9-14	60
15-24	55
25-44	32
45-64	12
65-79	3
All	33

From Westrell (1986), page 12. For background information, see Annex 1, Westrell (1987).

Table 20: Supply and consumption of five multilaterally and nationally distributed television channels in Kalmar, Sweden. 1985, one week.

Channel	Nationally and multilaterally distributed television: Supply - minutes per day -	% of supply		Nationally and multilaterally distributed television: Consumption - minutes per day -	% of consumption		Utilization: Consumption as percentage of supply
Swedish TV 1	619	15		48	32		5
Swedish TV 2	472	11		58	38		8
Sky Channel	985	24	T(m)-S =	39	26	T(m)-C =	3
Music Box	1,080	26	74%	6	4	30%	<1
Horizont	987	24		1	0		<1
Total	4,143	100		152	100		4

From Westrell (1986), page 6. For background information, see Annex 1, Westrell (1987).

transnationalization of programme categories in Table 21 reflect the content of commercial satellite channels (cf. Table 17) though it appears surprising that 33% and 45%, respectively, of the total supply of 'news´ and 'factual' were multilaterally distributed.
Column four in Table 21 represents total transnationalization of total supply in the area (there was no bilateral supply),i.e., foreignly produced, nationally distributed and multilaterally distributed hours related to total supply. With three exceptions only, total transnationalization of the programme categories was more than 50% and as high as 90% for 'movies', 'music' and 'fiction'.

Table 21: see next page

Table 21 clearly illustrates that a growing penetration of multilaterally television will cause an immense growth in transnationalization of total *supply*. The future relevance of total T-S measures as reported in Table 21 depend on the development of the parallel consumption figures. Table 22 presents the consumption figures corresponding to the supply data in Table 21[1].
Table 22 shows an extremely low T(m)-C for 'news' and 'factual' and as could be expected a very high T(m)-C for 'fiction' and 'music' and to some degree 'sports'. (There was no supply of 'mixed' programmes, 'children' and 'other'.)
While T(n)-C was 27%, *total* transnationalization of all television consumption in cabled Swedish households was more than 50% during the week under observation and considerable higher for 'movies' and 'music' (with no national options) and to some degree for 'sports'. Total transnationalization was low for 'news', 'factual' and - more remarkable - 'entertainment'[2].

Table 22: see next page

Perhaps the most rewarding way of analyzing the data is by comparing supply and consumption by the coefficients of utilization, see Table 23.
It is obvious from Tables 21 and 22 that the supply of multilaterally distributed television influences transnationalization of *total* consumption in a significant upward direction. But also - as further illustrated by Table 23 - that there is no direct relationship between multilaterally supply and total transnationalization of consumption. The existence of

[1]Comments on the first two columns of Table 22 are included in the section "The national dimension: T(n)-C.
[2]The lack of transnationalization of 'mixed programmes' and 'children'' are uninteresting since there were no foreign options and the data on 'other' are uninteresting due to the content of this category and weaknesses in the data material.

Table 21: T(n)-S, T(m)-S and T-S of supply of television hours in ten programme categories. Borlänge, Sweden. 1985. Average percent per day based on one week.

Programme categories	Nationally distributed: Domestically produced hours % of national supply	Nationally distributed: Imported hours T(n)-S % of national supply	Multilaterally distributed T(m)-S % of total supply	Total transnationalization of total supply T(n)+T(m) / T-S % of total supply	Domestically produced hours in % of total supply
News	100	0	33	33	67
Factual	67	33	45	64	36
Mixed programmes	100	0	0	0	100
Theatrical movies	0	100	0	100	0
Fiction	33	67	81	94	6
Entertainment	100	0	71	71	29
Music	100	0	93	93	7
Sports	100	0	57	57	29
Children	100	0	0	0	67
Other	60	40	0	40	50
Total	71	29	69	78	22
Hours	11.9	4.9	37.8	42.7	54.7

Calculated from Annex 3, Table 14. See this for further information.
Coloumns 1 and 2 add to 100%. Coloumns 4 and 5 should add to 100%. When they do not (sports, children, other) it is probably due to rounding offs in the basic material quoted in Annex 3, Table 14.
T(m)-S here is 69% and in Table 20, 74%. This is a reminder that the data are indicators of levels only being dependent on e.g. area, supply of satellite channels and length of period investigated.

Table 22: T(n)-C, T(m)-C and T-C of consumption of television hours in ten programme categories. Borlänge, Sweden. 1985. Average percent per day based on one week.

Programme categories	Nationally distributed: Domestically produced hours % of national consumption	Nationally distributed: Imported hours T(n)-C % of national consumption	Multilaterally distributed T(m)-C % of total consumption	Total transnationalization of total consumption T(n)+T(m) T-C % of total consumption	Domestically produced hours in % of total consumption
News	100	0	0	0	100
Factual	83	17	0	17	67
Mixed programmes	100	0	0	0	100
Theatrical movies	0	100	11	100	0
Fiction	30	70	59	85	10
Entertainment	100	0	10	10	80
Music	100	0	90	90	10
Sports	100	0	31	31	69
Children	100	0	0	0	100
Other	50	50	0	100	100
Total	73	27	33	51	49
Minutes	66	24	45	69	135

Calculated from Annex 3, Table 15. See this for further notes and information.
Coloumns 1 and 2 add to 100%. Coloumns 4 and 5 should add to 100%. When they do not (fiction and entertainment) it is probably due to rounding offs in the basic material quoted in Annex 3, Table 15. The same must explain the strange results in the third coloumn for movies when compared to the same cell in Table 21.

multilaterally distributed supply of television therefore increases the difficulties in using supply measures as indicators of second level effects.

Table 23 indicates that the degree of utilization of multilaterally distributed television is low. Both absolutely and compared to nationally distributed television. Based on Table 23 it appears reasonable to set up the hypothesis that viewers have the highest preference for domestically produced and nationally distributed programmes followed by nationally distributed imported programmes. At the third place multilaterally distributed programmes do not reach a degree of utilization in any programme category as high as those characterizing nationally distributed television. It may be useful to remember that these observations probably are strongly related to the quality of programming at the time of observation which was still a low budget pioneering period for the multilaterally distributed channels.

Table 23: see next page

THE BILATERAL DIMENSION T(b)-C

It is my impression that substantial evidence exists in most small West European countries on T(b)-C (but evidently not in the larger countries). However, only a few studies are internationally available and almost no comparative research exists.

The lack of internationally accessible data is one problem. Another problem is how to measure T(b)-C. The few national studies identified (e.g., Mills,1985; Bens and Knoche,1986; and Nordström,1987) report the percentages of viewers watching bilaterally distributed television in a specified time period. As already said this is not a very suitable measure. According to the approach suggested here consumption must be recorded in time units.

Hoijer(1981) is an exception to this. In an investigation of T(b)-C in the Netherlands, Belgium and Switzerland, Höijer(1981) found the results exhibited in Table 24 which indicate a very high proportion of T(b)-C in these countries.

Table 24: see next page

Table 23: Coefficients of utilization in ten programme categories. Borlänge, Sweden. 1985. Based on average percentages per day for one week.

	Consumption as percentage of supply				
Programme category	Domestically produced hours	Imported hours	All nationally distributed hours	Multilaterally distributed hours	Totally distributed hours
News	28	(0)	28	0	19
Factual	5	2	4	0	3
Mixed programmes	25	(0)	25	(0)	25
Theatrical movies	(0)	17	17	(0)	18
Fiction	13	14	13	5	7
Entertainment	17	(0)	17	1	6
Music	1	(0)	1	1	1
Sports	23	(0)	23	5	10
Children	2	(0)	2	(0)	1
Other	1	2	1	(0)	1
Total	10	8	10	2	4

Calculated from Annex 3, Table 14 and 15. See these tables for further notes and information, cf. also Tables 21 and 22.
Brackets indicate that there have been no supply..

Table 24: Consumption of nationally and bilaterally distributed television hours in three West European countries and six language groups. 1980.

Country	% of total consumption	
	National channels	Foreign channels = T(b)-C
The Netherlands	81	11
Dutch speaking Belgians	60	40
French speaking Belgians	43	57
German speaking Swiss	64	36
French speaking Swiss	41	59
Italian speaking Swiss	60	40

From Höijer (1981), page 35. No information available on background of data.

Höijer(1981) also presents the consumption data according to language. Table 25 shows that 'formal' bilateral transnationalization may be high but not 'trans lingual' consumption in the small countries sharing a language with a big neighbour[1].

Table 25: see next page

Another example of relevant data (Findahl,1986)[2] shows that in 1985 the Dutch population over twelve years spend 82% of total consumption time on the two national Dutch channels, 10% on the three bilaterally distributed West German channels and 5% on the two (bilaterally distributed) Flemmish language Belgian channels, i.e., T(b)-C = 15%. T(m)-C was 3% spent on the multilaterally distributed Sky Channel. Among the 34% and 22% of Dutch viewers able to receive Sky Channel and Music Box, respectively, the share of national consumption dropped 4% and the share of bilateral consumption 3%. Considering the statistical uncertainty on such measures these changes appear insignificant. To obtain a full picture of transnationalization of Dutch television consumption (the unknown) T(n)-C must of course be added to T(b)-C and T(m)-C.
A third example of the importance of consumption of bilaterally distributed television (and the kind of research necessary to measure T(b)-C) is from Denmark which has an independent language, and which is surrounded by a large supply of foreign television: three West German, two Swedish, two East German channels and one Norwegian channel. The observations are from one week in 1984.

Svendsen(1984) found that among the 34% of Danish viewers over thirteen years who were able to receive Swedish television, T(b)-C (measured as a share of total national consumption) was 17% or approximately three hours per week. Among the 22% of viewers able to watch West German television T(b)-C was 29% or approximately six hours per week.
The 8% of the viewers able to receive both Swedish and West German television used 5% and 23% of consumed hours (or approximately seven hours in total per week) on bilaterally distributed Swedish and West German television, respectively.
At the average Danish viewers over thirteen years who were able to receive bilaterally distributed television spent two hours and forty-five minutes out of a total consumption

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[1]These findings are supported by Findahl(1986) reporting that in 1985 98% of French speaking Belgians' television consumption was spent on seven French language channels two of which were national and that 85% of Dutch speaking Belgians' television consumption was spent on four Dutch language channels, two of which were national. Both groups had access to nine or thirteen other foreign language channels.

[2]From **Bereik en kijkdichtheid TV-senders**, NOS, Hilversum, 1986. The data are from 1312 diaries from a representative sample of the Dutch population over twelve years for a two week period.

Table 25: Consumption of national and foreign language programmes in three West European countries and six language groups. 1980.

Country	% of total consumption	
	Own language	Foreign language
The Netherlands	92	8
Dutch speaking Belgians	85	15
French speaking Belgians	100	0
German speaking Swiss	86	14
French speaking Swiss	98	2
Italian speaking Swiss	87	13

From Höijer (1981), page 35. No information available on background of data.

of seventeen hours on bilaterally distributed television, i.e., T(b)-C was 16%. To this transnationalization must be added the share of the remaining viewing time related to foreign programmes in Danish television[1].

The few findings reported in this section *illustrate* the importance of T(b)-C for the total transnationalization of consumption. However, they also indicate the difficulty of generalizing about the small West European countries *and* that centrally organized comparative research is necessary for a deeper understanding of this element of transnationalization of West European television.

THE NATIONAL DIMENSION: T(n)-C

Until recently researchers seem to have been satisfied with supply measures of transnationalization of nationally distributed television - or at least practical reasons have prevented them from a more qualified approach. Anyhow, the empirical research on consumption of nationally distributed television is strictly limited[2].

Berg(1978) is probably the first report on transnationalization of consumption of nationally distributed television. Unfortunately, the data do not allow calculation of T(n)-C as conceptualized here.

Mills(1985) presents data which have been 'translated' into T(n)-S, T(n)-S/USA and T(n)-C and T(n)-C/USA in Table 26. The methodological background of the data is not known but in principle they represent an ideal model for future research. Mills concludes that "U.S., and indeed all, imports are reflected in viewing in approximately the same proportion as in output. This indicates that imported programmes as a whole attract audiences of around the same size as nationally produced output". (Mills,1985, page 493).
Mills(1985) also claims (but does not substantiate) that consumption of imported programmes is higher among young people than to older viewers. Both findings are supported by the study of Danish television which is reported below.

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[1] T(n)-C is identified and total transnationalization of consumption calculated in the section "Total transnationalization, Denmark 1984 in this chapter.
[2]Beside the data presented in this section T(n)-C data from Sweden, 1985 are reported in Table 22.

Table 26:see next page

An outspoken critique of the traditional supply measures can be found in **Lealand**(1984). Unfortunately, Lealand's(1984) attempt to carry out another approach is not very successful and does not produce data suitable for T(n)-S and T(n)-C measures.

Transnationalization of Danish television consumption, 1984-87

It is obvious from the approach of this study and the conclusions so far that knowledge of transnationalization of consumption is necessary for further progress of the research into 'second level' effects of international television flows. And that transnationalization of consumption for this purpose is a more rewarding 'first level' effect variable and 'second level' independent variable than transnationalization of supply. The lack of research on transnationalization of consumption is both disappointing and unacceptable from a research point of view and from a media policy point of view.

As part of this study I therefore investigated transnationalization of consumption (and supply) of television in Denmark. The analysis is a modest contribution to be filled into a big gap and the results *as such* are first and foremost interesting in Denmark. However, they might also interest others as an example of the situation in a small West European country, and as an example of the consumption oriented approach and what can be learned from it.

The methodology of the study was to a large degree determined by the circumstances but the use of normal audience research data was also motivated by a hope to inspire broadcasters to adopt the simple basic procedures illustrated here in standard reporting. A much better knowledge of the 'first level' effects of international television flows is possible if consumption measures of multilaterally and bilaterally distributed television are incorporated in standard audience research. Hopefully, such national approaches will be followed by standardized, centrally coordinated, regular European studies which can be integrated into similar UNESCO-coordinated global approaches.

As described in more detail in Annex 1 the production country of programmes was added to the audience research data base of Denmark's Radio for the period 1984-87 which already comprised supply and consumption data. This made it possible to carry out the calculations necessary to operationalize the concepts and measures in this study.

Table 26: Imported shares and USA shares of total supply and consumption of nationally distributed television hours in four countries. 1980.

Country	I(n)-S %	I(n)-C %	I(n)-S/USA %	I(n)-C/USA %
Belgium	80[1]	74[1]	14	18
France	9	11	7	9
Canada	54	48	44	38
Japan	9	6	7	3

From Mills (1985), Table 6, quoting GEAR statistics 1980 (Group of European Audience Researchers).
1: Probably these figures include bilaterally distributed television in some way.

One advantage of using a consumption approach to transnationalization is the possibility of integrating the national, bilateral and multilateral dimensions of television. Unfortunately, the data used here only include nationally distributed television.
The analysis is based on ten weeks of research from 1984-87. To avoid longitudinal interpretations (for which I suppose the samples of three weeks per year are not reliable enough) the data are not presented on a year by year basis. The main issue has been to create a reliable sample to describe transnationalization.

Background information on the study is found in Annex 1 and Annex 3, Table 16, including sample sizes, absolute figures and details on cross tabulations[1]. Due to the character of the available information it has not been possible to detail the unsatisfactory categorization of countries of origin. Approximately half of the supply from 'other European countries' is estimated by Denmark´s Radio to be British.

For all hours broadcasted during the ten weeks, the first row in Table 27 shows transnationalization of supply (T(n)-S) and the national origin of this transnationalization (T(n)-S/CO). The second row shows the corresponding consumption data and the third row the coefficients of utilization, i.e., consumption hours as a percentage of supply hours.

Table 27: see next page

With no empirical guidance available the hypothesis was that transnationalization of consumption would be higher than that of supply, implying a higher coefficient of utilization of imported material - especially US programming - than of domestically produced programmes.
Table 27 only confirms this hypothesis to a certain extent. The T(n)-C/USA is 15% and T(n)-S/USA is 9%, which means that the position of US television (or probably more correctly: the kind of programmes imported from the USA) is significantly higher when measured by consumption than when measured by supply. However, the other differences between the two measures of transnationalization are too small to be really interesting and *total* transnationalization of supply and consumption are almost identical. These findings are parallel to the results obtained by Westrell(1987), see Table 21 and 22. On might set up the hypothesis from Table 27 (supported by Westrell,1987) concerning *all* imports) that transnationalization of total consumption follows that of total

[1]The total sample is 9,854 persons over thirteen years. The data are based on personal interviews, weeks 7, 31 and 48 in 1984-86 and week 7 in 1987. The data on transnationalization of supply are found in Tables 8 and 15.

Table 27: Imported shares of supply and consumption of television hours in Denmark. 1984-87, ten weeks.

	% of total supply and consumption of television from													
	Nordic countries		European countries		USA		Others		Total imports		Denmark = domestic		Total	
	I(n)-S/CO	I(n)-C/CO	I(n)-S/CO	I(n)-C/CO	I(n)-S/CO	I(n)-C/CO	I(n)-S/CO	I(n)-C/CO	I(n)-S	I(n)-C	Supply	Consumption	Minutes	%
supply	3		21		9		1		34		66		36,620	100
consumption		3		19		15		1		38		62	6,420	100
Utilization	15		16		29		11		19		17		18	

Background and methodology in Annex 1.

supply up to certain limits at least. A very interesting question in policy terms is then within what limits transnationalization of consumption and supply of nationally distributed television are parallel?
An expedient way of comparing transnationalization of supply and consumption is to calculate the coefficients of utilization. The highest utilization is for US programming (demonstrating the obvious fact that demand factors must be taken into account and not only supply factors when trying to understand the role of US television, i.e., the potential effects of (economic) supply factors are influenced by the preferences of the audience). The second highest utilization is for domestic programming which is utilized to the same degree as all imports together.

According to the dominating standard procedures of earlier research on transnationalization of supply these findings would be reported as the foreign suppliers´ share of imported hours. If total consumption of imported programmes is 100%, these shares would be 2% to 'others', 7% to other Nordic countries, 41% to the USA and 50% to 'other European' countries. Mapped in this way US programming would be totally dominating if comparing individual nations - but when the main interest is on the 'second level' effects of transnationalization of consumption this way of describing the situation has very limited relevance. It is the shares of *total* consumption which are important.

Knowledge of transnationalization of supply and consumption is important. However, it would be even more interesting to relate a gratification measure to the national origin of programming. In the audience research of Denmark's Radio 'gratification' is indicated by an 'appreciation measure' on a five point scale from 'good' to 'bad'. In the data analysis these measures were related to the nationality of programming. It is possible to calculate the average character for each national category but weighed with the number of 'viewers' (where 'persons' are used in all other calculations). Since it is necessary to be very careful with the interpretation of these average measures of 'gratification' and since the differences found were very small it was decided not to report the results[1].
It is possible to calculate the consumption data from row one in Table 27 according to sex, age, education, urbanization and the possibility of receiving bilaterally distributed television. The results are found in Annex 3, Table 16 and show no significant correlations between transnationalization of consumption and these characteristics except age

[1]The data indicated very small differences between domestic, other European and US productions, whereas programming from the Nordic and 'other' countries was a little less gratifying. The small differences appear to be consistent with the supply and consumption measures.

for which the data indicate a declining transnationalization of consumption with growing age (42% in age group 20-29 and 32% for those older than 66 years).

In Table 28 transnationalization of consumption is related to programme categories. To facilitate comparison with the corresponding supply figures the data from Table 13 have been included. Table 28 clearly illustrates the value of knowledge of consumption and the ideal situation of being able to compare with supply data.
From the research on transnationalization of *supply* of programme categories reviewed earlier it was concluded that transnationalization of 'factual' programmes was considerable lower than that of fiction. The conclusion on transnationalization of consumption is the same but Table 28 also indicates that the viewers used their 'freedom of choice' within the given supply to double transnationalization of 'factual' programming compared to that of supply (and diminished transnationalization of 'sports'), whereas transnationalization of 'drama' programming was only slightly higher in consumption than in supply[1] . The 'freedom of choice' was also used to increase the share of US television in *fiction* consumption compared to supply at the expense of other European countries and domestically produced 'drama'. Compared to supply the viewers increased the share of domestic 'music' and 'entertainment' in consumption.
The overall conclusion that transnationalization of *total* supply and *total* consumption is almost the same is not wrong. However, the pattern of transnationalization of consumption is significantly different from that of supply when programme categories are taken into account. Especially the share of US television (concentrated on fiction) increases.

Table 28: see next page

In Annex 3, Table 15 it is possible to compare transnationalization of consumption before and after 7.30 pm. The differences between the two time bands are very small. The main difference between the two periods is the increase of domestic and US share of consumption in peak time at the expense of 'other European' programming, cf. also the coefficients of utilization. This is most probably a consequence of changes in the mix of programme categories which cannot be checked in the data material.

Total transnationalization, Denmark 1984

By combining the findings on consumption of bilaterally distributed television from Svendsen(1984) and the findings on T(n)-C reported above it is possible to estimate the total transnationalization of television consumption in Denmark in 1984.

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[1]This is parallel to the findings of Westrell(1987), cf. Tables 21 and 22.

Table 28: Imported shares of supply and consumption in Denmark in five programme categories. 1984-87, ten weeks.

Programme categories	% of total supply and consumption from Nordic countries	European countries	USA	Total imports	Denmark = domestic	Total Min	%
CONSUMPTION	I(n)-C/CO	I(n)-C/CO	I(n)-C/CO	I(n)-C			
Factual	3	18	2	23	77	1,280	100
Sports	4	36	6	46	54	900	100
Drama	4	34	48	86	14	1,850	100
Music, light entertainment	3	3	2	8	92	950	100
Others	0	0	0	0	100	290	100
All hours	3	19	15	38	62	6,420	100
SUPPLY	I(n)-S/CO	I(n)-S/CO	I(n)-S/CO	I(n)-S			
Factual	2	8	1	11	89	15,030	100
Sports	4	45	8	57	43	5,500	100
Drama	1	42	32	81	19	8,020	100
Music, light entertainment	2	8	4	14	86	5,590	100
Others	0	0	0	0	100	2,110	100
All hours	3	21	9	34	66	36,620	100
UTILIZATION							
Factual	13	18	12	17	7	9	
Sports	20	13	12	24	21	16	
Drama	12	19	35	24	17	23	
Music, light entertainment	27	6	11	10	18	17	
Others	0	0	0	0	14	14	
All hours	15	16	29	19	17	18	

Background and methodology in Annex I.
'Other countries' have been excluded due to the little share of total supply and consumption.

The reason for reporting these relatively old data from one specific country is not so much the actual findings as the possibility to exemplify the ideal measure[1] of transnationalization. Also the data demonstrate the necessity of including the bilateral dimension of consumption - at least in small countries - to understand transnationalization of consumption fully.

Because of this purpose and the uncertainties related to the basic data no details are reported. The analysis uses the bilateral viewing hours for one week from Svendsen(1984) and T(n)-C calculated specifically for three weeks in 1984 from Denmark's Radio's audience research. The results are as follows:

	Minutes	% of total
Total consumption per week	1020	100
Domestic, nationally distributed	487	48
Imported, nationally distributed	368	36
Bilaterally distributed: T(b)-C	165	16
Total foreignly produced	533	52

T(n)-S in 1984 was 35% and T(n)-C was 43%. However, this transnationalization of consumption of nationally distributed television (the 368 minutes) only accounts for 69% of total transnationalization of all consumption (533 minutes). When T(b)-C (165 minutes or 16%) is added to T(n)-C total transnationalization of all consumed television hours, T-C, appears to be 52%. At least for the (small) countries with high reception possibilities for bilaterally distributed television it is obvious that a true picture of transnationalization must incorporate bilaterally distributed television (and multilaterally distributed television as demonstrated by Table 22).

The small study of transnationalization of Danish television in 1984 thus reveals that though two thirds of nationally distributed television was domestically produced, more than half of the total consumption was related to programmes produced in other countries. As to the (supposed) special US problem of (small) West European countries the 1984 data show that T(n)-C/US was 12%. This share would probably be smaller if consumption of US television was compared to *all* television hours including the bilateral consumption of Swedish and West German television though some of those hours must have been be US produced, cf. the preference for US fiction demonstrated in Table 28.

[1]The ideal measure also includes the multilateral dimension which, however, did not exist in Denmark in 1984.

CONCLUSION ON TRANSNATIONALIZATION OF CONSUMPTION OF TELEVISION

Existing research on transnationalization only allows for one definite conclusion: the need for more research! Very little is *known* on this fundamental issue for insight in the implications of international television flows in Europe. Beyond that the limited knowledge and the analysis here support these *hypotheses:*

* Consumption of multilaterally distributed television is not yet generally significant. But there are indications that it does play an important role in some ten to twenty percent of West European (cabled) households. Since supply (and consumption) of multilaterally distributed television are generally expected to grow T(m)-C should therefore be incorporated in future research.

* Consumption of bilaterally distributed television is a decisive element of transnationalization of consumption in most small countries. In some countries it probably corresponds to consumption of foreign television products in nationally distributed television. Due to T(b)-C total transnationalization is much higher and less US dominated in West Europe than generally thought from the classical supply analyses related to nationally distributed television.

* Supply measures of multilaterally and bilaterally distributed television are already today very difficult (if not impossible) to administer. Supply measures of nationally distributed television will also be more and more difficult to handle due to growing number of channels, including a growing number of local and regional channels.

  Supply can perform *economic* problems at the 'first level' of effects of international television flows but only perform 'threats' or 'promises' ('second level' effects) via the potential consumption. Consumption measures are therefore necessary as indicators of 'second level' effects - and the most practical way of measuring transnationalization as a 'first level' effect since they are relatively easy to administer and normally included in standard audience research which should also be developed to incorporate (and separate) the three dimensions of transnationalization.

  It is an advantage if consumption measures are supplemented with supply measures since it allows for calculation of coefficients of utilization for different categories of television. Maintaining supply measures may also have a cultural policy

motive. The success of private channels is measured by consumption only, whereas the societal or cultural rationale or success of public service channels may be perceived as a combination of consumption and the sheer existence of certain categories of supply - which only supply measures can validate.

* It is not possible to generalize about transnationalization of television consumption in West Europe as such. Transnationalization of nationally distributed television is widely different in small and large countries and between countries in these two groups and total transnationalization further depends on the reception possibilities for bilaterally and multilaterally distributed television.

* Countries with a *substantial* T(n)-S probably have a relatively close correlation between transnationalization of *total* supply and *total* consumption. In *general* US television plays a substantial role for transnationalization of consumption. The correlation between total supply and consumption is considerably lower when total supply is divided into programme categories. Generally, it is fiction and an outspoken audience preference for US fiction which dominates transnationalization of consumption.

* If local television expands further than today this will influence transnationalization of supply and consumption. The direction of this influence depends of course totally on the content of local television. Most probably, the transnationalization of supply of 'genuine' local television will be very limited and thereby subtract from total transnationalization of consumption of television.

Chapter 4

DETERMINANTS AND EFFECTS OF TRANSNATIONALIZATION

In this study a two step procedure is suggested for understanding the effects of international television flows. At the first level the independent variable 'international television flows' determines the dependent effect variable 'transnationalization of supply' which forms the background of the decisive dependent effect variable 'transnationalization of consumption'. At the second level 'transnationalization of supply' and (better) 'transnationalization of consumption' become the independent variables which determine the dependent effect variables of a cultural and economic character which for both scientific and practical purposes constitute the ultimate interest of research on international communication flows.

The review presented here has implied a certain critique of existing research on 'first level' effects and thereby the reliability of the (supposed) knowledge on these effects.
Discussions on international television flows normally concentrate on effects at the second level, assuming that a high - US dominated - transnationalization of television supply (and consumption) is a reality in West Europe. These discussions suffer from the lack of substantial knowledge on the 'first level' effects. Also the discussions of second 'level effects' are normally very general. No distinctions are made according to the quantity and quality of transnationalization (as defined here), characteristics of countries or potential receivers - or to the national alternatives available to foreign television products. It seems to be commonly agreed upon by most commentators that there is an 'undue' influence of foreign transnationalization in West Europe. Also 'foreign television' appears to be more or less explicitly identified with US television programmes and the influence of of these programmes is (almost) undifferentiated perceived as negative.
It is a basic problem in discussions on international television flows and their implications that second level effects cannot be discussed without specifying the size and character of the independent variable. This is even more so if the discussion is oriented toward policy measures.
In spite of these reflections and in spite of the insufficient knowledge of the dependent 'first level' effects (transnationalization of consumption and supply) I have found it useful to round off the review of this knowledge by briefly discussing what I consider some of the most quoted standard assumptions on 'second level' effects (cf. the list of References) and by briefly discussing the determinants of the transnationalization of supply and consumption which have been demonstrated in this study.

DETERMINANTS OF TRANSNATIONALIZATION

An understanding of the determinants of transnationalization is not necessary for the study of 'second level' effects but certainly unavoidable for creating policy measures to facilitate changes of possible undesired 'second level' effects.

As mentioned in the "Background" chapter the main stream of studies on international communication flows in some way relate to the concept of 'media imperialism' or the 'media imperialism thesis' and it was set up as a sub purpose of this study to evaluate the validity of the 'media imperialism thesis' in a West European context. This evaluation is pursued through the following brief discussion of the determinants of transnationalization - which is a consequence of the international television flows to which the concept of media imperialism is normally related[1].

THE MEDIA IMPERIALISM THESIS

The introduction of cultural or media imperialism as an explanation of (supposed) unbalanced international television flows (and their consequences) must be attributed to Schiller(1969). The easiest way to present the 'Schiller-version' of the media imperialism thesis is by quoting two summaries by Tunstall(1977) and Lee(1980).
Tunstall(1977, p 39) writes: "Schiller´s thesis - that the American television exports are part of an attempt by the American industrial complex to subjugate the world ..." and Lee(1980, 37) has understood Schiller´s(1969) implicit explanation of the examples presented of US 'dominance' in the same way: "Communication imperialism is to him <Schiller(1969)> a conscious and organized effort taken by the U.S. military-communication conglomerates to maintain a commercial, political and military superiority."

From the other works by Herbert I. Schiller quoted below (and his contribution to the "total system approach" in Nordenstreng and Varis,1974) there is no doubt that Schiller also includes basic economic mechanisms in the capitalistic economic system in his understanding of media imperialism. However, the 'media imperialism school' based on Schiller(1969) is characterized by the elements stressed in the two interpretations (Tunstall,1977 and Lee,1980), i.e., that the media imperialism explanation involves

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[1]Some characteristics of countries with high and low T(n)-S have already been discussed in the section "Transnationalization of television supply in specific countries:T(n)-S".

more than purely economic relations and behaviour, more than 'just' the (market) forces of the capitalistic economic system. This 'more' is a political or ideological perspective which involves 'intentionality', not to say 'conspiracy', implying a sort of moral perspective to the concept of media imperialism.

In the highly quoted Nordenstreng and Varis(1974) the authors do not explicitly define 'media imperialism' but write: "Accordingly, the term "communication imperialism" should not be understood as a separate phenomenon but rather as a particular aspect of a single mechanism of imperialism basically determined by economic relations within and between nations" (page 55).

Though Nordenstreng and Varis(1974) do not specify the term 'imperialism' in the above quotation it is my interpretation that the authors relate to the basic Marxist understanding based on Lenin´s theory of imperialism which explains all international relations in terms of underlying economic forces. Understood in this way the concept of imperialism does not indicate 'intentions or conspiracy' or bad will or other moral implications.

Nordenstreng and Varis(1974) call their understanding of media imperialism "the total system approach" and credit a contribution by H.I. Schiller in Nordenstreng and Varis(1974) for this concept and explanation which they find subsumes all economic explanations and provides a common framework within which individual factors may be viewed in a meaningful way.

To this Nordenstreng and Varis(1974, page 55) add: "As the present authors understand it, this approach by no means excludes cultural, political or linguistic conditions; these are merely viewed as an interrelated complex around economic factors. It is the economic conditions and the market structure that are seen as primary factors within this complex of relationships."

In summary, Nordenstreng and Varis(1974) in this central contribution on 'media imperialism' introduces more clearly than anywhere else that there are two main 'categories' of explanatory factors (in the 'media imperialism thesis') of international television flows - or transnationalization: one category is made up by economic, social and cultural elements, the other by (conscious) political or ideological elements.

As I see it the controversy and the use and understanding of media imperialism as an explanatory factor of international communication flows in the literature is related to (1) the priority given to these two categories and (2) the priority given to micro or business economic explanations versus a more macro economic understanding. Some *examples* of conceptualizations of 'media imperialism' can be found in the following discourse in chronological order

Outlines of 'media imperialism' in the literature. A discourse

Mattelart(1976) attacks the 'trade balance' oriented approaches to the understanding of media imperialism offering the following 'definition' of "cultural imperialism": "Cultural imperialism cannot be summed up as the volume of imported products or cultural commodities. The USA produces the models, but the national bourgeoises may perfectly well 'nationalize' these models" (page 161).

Read(1976) is - according to his own understanding - a typical representative of the perception of transnationalization as a consequence of purely business oriented decisions and explicitly rejects 'conspiracy' oriented explanations: "One explanation that can be dispended with fairly quickly is the assertation that private American media fully collaborated with post World War II U.S. Government to achieve this end. While there are shreds of evidence to suggest this near-conspiracy theory, the great body of information supports the opposite view" (page 6-7).

The most explicit definition on media imperialism by H. I. Schiller is found in **Schiller(1976)** which states that:""...the concept of cultural imperialism today best describes the sum of processes by which a society is brought into the modern world system and how its dominating stratum is attracted, pressured and forced into shaping social institutions to correspond to, or even promote, the values and structures of the dominant centre of the system" (page 9). This statement represents a kind of descriptive definition which is very difficult to evaluate empirically, to perceive as an explanation of transnationalization, and to use for policy purposes.

Another descriptive definition - often quoted - is from **Boyd-Barret(1977)** which presents the concept and the following definition as "a distinct analytical tool": "Broadly speaking the term <media imperialism> refers to the process whereby the ownership, structure, distribution or content of the media in any one country are singly or together subject to substantial pressure from the media interests of any other country or countries without proportionate reciprocation of influence by the country so affected" (page 117). Unfortunately, the concepts and the formulation are to vague to offer any possibilities of testing when interested in 'media imperialism' as an explanatory factor of transnationalization. Generally Boyd-Barret(1977) supports a high priority to the 'intentional' element of 'media imperialism' and suggests four degrees of this intentionality.'

Katz and Wedell(1977) are open to both economic and political elements from "the media imperialism thesis' in their attempt to explain media development in developing countries (including what is here called transnationalization). They emphasize economic and cultural explanations in the 'importing countries' and they explicitly reject any "strong broadcasting imperialism thesis" by which they probably referring to the version stressing intentional elements, as their research provide much systematic evidence of the economic factors of the media imperialism thesis.

Tunstall(1977) is a milestone in the literature on international communications but not very explicit on media imperialism as an explanatory factor of transnationalization (the US 'dominance' in global television flows). Tunstall(1977) belongs to the balanced Nordenstreng and Varis(1974) conceptualization of media imperialism and devotes relatively much effort to modify the conspiracy version and the moral dimensions in the understanding of media imperialism and stresses a number of social and economic factors in the "dominated" countries to understand transnationalization.

Lee(1980) is probably the most ambitious theoretical approach to developing 'media imperialism' as an explanatory factor of transnationalization. Lee(1980) definitely rejects the moral, ideological and intentional aspects of media imperialism (referring basically to the work of Schiller). Lee(1980) distinguishes between a Marxist and non-Marxist approach to media imperialism but wrongly associates the 'conspiracy version' of media imperialism with Marxism and do not see that the basic distinctions between a Marxist and non-Marxist approach relates to the priority given to macro and micro economic determinants of transnationalization (cf. the confrontation between Schiller(1973) and Read(1976), page 57). Lee(1980) criticizes the 'Schiller-school' (the intentional aspect) for not being able (or care) to explain why economically highly developed countries also are importers of US television but do not contribute to this understanding because the economic and social factors are not developed in the conceptualization of media imperialism. Instead Lee(1980) develops four "levels of generality of media imperialism" , However, these 'levels' are a mix of measures of transnationalization (level one and two) and 'second level' effects (level three and four), cf. Lee(1980, page 68).

Fejes(1981) is another attempt to develop the 'media imperialism thesis' theoretically. The approach is devoted to the relation between 'developing' and 'developed' countries. The explicit definition of media imperialism offered by Fejes(1981) is of a descriptive character which cannot be applied for establishing media imperialism as an determinant of transnationalization: "For the purpose of this discussion, media imperialism shall be used in a broad and general manner to describe the process by which modern communication media have operated to create, maintain and expand systems of domination and dependence on a world scale" (page 281).

Chill(1983) is not specifically dealing with media imperialism in the attempt to explain the success of US television exports. However, it is an example of stressing business oriented explanations which provides an interesting analysis of business determinants in the USA.

Anderson(1984) is in the context here an extreme example of using the intentional, ideological element of media imperialism as the only explanation of transnationalization (of advertising). Based on 'the structural theory of imperialism (Galtung,1971), Anderson(1984) literally perceives the centre dominance of the periphery as an independent goal for the transnational agencies co-operating with their national governments. Anderson(1984) does not succeed in the attempt to verify this by an impressing amount of empirical examples which probably would be better understood from a business economics oriented point of view.

Boyd(1984) represents a dedicated rejection of intentional, ideological elements (referring to the 'Schiller-version' of the media imperialism thesis) as having explanatory value for understanding transnationalization and instead insists on social and cultural factors in the receiving country and business decisions as determinants of transnationalization.

Mattelart et al(1984) is (together with Tunstall,1977) one of the very few contributions to the research on international television flows that insists on the impossibility of establishing a general (media imperialism) thesis to explain transnationalization. As a consequence of the priority given to economic and cultural explanations Mattelart et al(1984) points to the necessity of separating between countries and cultures when establishing explanations of transnationalization. The authors insist on the importance of economic and technical determinants of cultural production, distribution and consumption but stress the necessity of avoiding the technological and economic determinism they obviously associate with the 'Schiller-school' of media imperialism. Mattelart et al(1984) appears to support an understanding of economic determinants of transnationalization along the line of both micro and macro economic factors by suggesting to concentrate on the features of the multinational capital´s cultural forms.

Tracey(1985) represents the recent critical attitude to the media imperialism explanation of transnationalization critizising both the intentional or conspiracy elements of media imperialism and the lack of empirical evidence of media imperialism as such. Tracey(1985) suggests that much more attention should be given to audience related explanations (consumption and reception).

I interpret 'media imperialism' as an explanation of transnationalization comprising three main elements of explanatory factors: (1) a set of explanatory factors related to political and ideological motives, (2) a set of economic, social and cultural explanatory factors *and* (3) a set of viewer related factors which are not part of the traditional conceptualization of media imperialism.

The economic factors relate to macro elements as for example total economic resources but they also relate to micro economic elements like the well known reasons for the competitive strength of especially the US television products: The US producers of television has the largest single language home market in the world. This home market is extremely commercial and (therefore) fiction oriented. One consequence of this is an enormous pool of fiction programmes which have already paid off as investments and which are expensive from a production cost perspective.
Since the productions costs and a profit normally have been earned at the home market the US programmes can be profitably sold to anything above the costs of shipment. Prices are adapted to individual importers´ ability and willingness to pay with no relation to the original productions costs (prohibitive to most television producers in countries with a smaller home market) and to less than the 'normal' production costs in any country, the minimum of which is independent of the size of the country and thereby the potential income whether advertising or license fees. Assuming a certain relation between productions costs and programme attractiveness this well known mechanism implies a decisive competitive advantage on an unregulated market from a pure business perspective.
Also, US television programmes are produced to a cultural heterogeneous and complex market with elements from almost any national cultures outside the USA. Together with the experience from a long tradition for US dominance of the world market for theatrical movies this has created a highly developed flair for creating an appealing common denominator content of fiction programmes compared to the much more specific cultural characteristics of other countries producing large quantities of television like Great Britain, the USSR, Japan, Brazil, Italy or France - a common denominator which during the years have proved extremely fascinating across national cultures and which has almost developed - also through imitation - to be synonymous with entertainment.

At the demand side a high number of (West European) channels have a large need for programming. All broadcasters are looking for inexpensive programming and especially the commercial channels are looking for attractive broad appealing entertainment programming. By experience the readily available US programmes fill that need.
In short, also economic factors at the demand side such as absolute resources and commercialization are important determinants of varying levels of transnationalization. It is necessary in much more detail on a national basis to study the reasons for imports as a contribution to identifying determinants of transnationalization - as well as to investigate specifically why or whether the exporters (or importers) do have ideological motives beside the economic ones. Such approaches would be more realistic and correspond better to the little knowledge we have than to perceive most countries as passive recipients of television from a few other countries.

Whether planned or not these economic and cultural realities have placed the US television producers in a dominating position on the world market. The competitors can only offer very few competing products which are almost 'invisible' compared to the accumulated demand of the world or West European market. This is the situation of the small West European countries (which actually have a relatively high export ratio of domestic fiction products). Or the products of the competitors are created to fit into more specific and unique national cultures, cf. for example Japan or France. A few countries are able to establish qualified competition, especially Great Britain, but the relevant supply is small compared to that of the USA.
One might assume that the creation of significant competition to the USA on the West European market 'simply' demands the products to be competitive at the US home market and then the productions will be difficult to distinguish from the US supply[1].

The mechanisms briefly described above may be denominated 'market forces', 'conspiration'; 'subjugation': 'domination'; 'dumping' or 'entrepeneurship' or understood as (one of several elements of) 'media imperialism'. The essence is that they create a favourable competitive position (of economic nature) for US television products globally, including the West European television market and that this position is an important

[1]Actually, an analysis from a trade balance point of view of the only global study available (Varis,1985) indicate that West Europe as one economic unit has a positive balance of trade in television programmes against the USA. During the two weeks of observation, it is possible to calculate from Figures 1-9 and the parallel tables that the USA exported 492 hours to West Europe and imported 1,477 hours from West Europe. This import (mainly from Great Britain) went to a few PBS stations and totally 'disappeared' in the US home market supply which -according to Varis(1985) had a T(n)-S of 2% only. The US export to West Europe was to large national channels where the US products relatively took up much more place.

explanation or determinant of the generally high shares of transnationalization of supply related to US programmes.

In most of the small West European countries the British share of transnationalization is higher or almost as high as the US share according to the data reported in this study. The economic explanations proposed above relating to size of home market, amount of production and prices appear to be valid explanations of this phenomenon too. It must also be remembered that very capital demanding (commercial) investments in programming inside West Europe are only possible if aiming at an international market (other West European countries mainly) which facilitates transnationalization. (See for example Hoffman-Riem(1985) for an analysis of this).[1]

The discussion of economic determinants is (implicitly) related to nationally distributed television but in the rough form chosen for the purpose here the discussion is valid also for understanding the programme mix of multilaterally distributed television as to national origin and programme categories.

Returning to the question of the validity of the 'media imperialism thesis' as an explanation of transnationalization of television supply in West Europe it is evident that the answer depends on the interpretation of the concept of 'media imperialism'.

It is obvious that there is no empirical verification in the data presented here for the 'ideological/intentional' element of the media imperialism thesis (or in some cases *the* element)[2].

As to the economic, cultural and social determinants outlined above the data on transnationalization compiled in this study cannot in principle verify the existence of such mechanisms. However, a high (US) transnationalization support the arguments for such mechanisms being active.

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[1]Macro economic factors and the more micro oriented analysis outlined here can be found - also in more details - in several publications. For some of the best analyses, see, e.g., Nordenstreng and Varis(1974); Tunstall(1977); Pragnell(1984); Garnham(1984) and Giersing(1982).

[2]This of course does not imply that the 'intentional' element cannot be substantiated theoretically. Including works related to advertising and focusing on the relation between 'developing' and 'developed' countries arguments for and *examples* of ideological motives and intentionality are *for example* presented in Anderson(1984); Becker(1986); Hamelink(1977 and 1983); Janus and Roncagliolo(1979); **Many Voices. One World**(1980); Mattelart(1976,1979, 1985); Nordenstreng and Schiller(1979); Schiller(1969, 1971, 1976, 1984); Smythe(1981).
Arguments against an ideological/intentional element of media imperialism (or against media imperialism as such) are *for example* presented in Breton(1982); Boyd(1984); Lealand(1984); Mattelart et al(1985); Pool(1977); Read(1976); Tracey(1985); Tunstall(1977).

Based on the conclusions on transnationalization of supply it is my interpretation that the relevance of the economic, cultural and social element of the media imperialism thesis for West Europe (1) changes from nation to nation; (2) that these mechanisms only influence the *total* supply of television in West Europe to a small extent, whereas (3) the mechanisms seem more active in relation to a number of small countries and (4) that these elements of 'media imperialism' are active compared to most countries in the supply of *fiction* programming, and (5) that when active they do not work independently of policy decisions in individual countries but on the background or dependent on such policies. They function better if a small country decides on a large supply (e.g., Ireland) compared to a more limited supply (e.g., Norway) or they work better when television is advertising financed or private compared to non-commercial public service channels (e.g., Italy versus Denmark); (6) that the economic analysis applies better to low than high income countries (Ireland, Belgium, Sweden).

This analysis is tentative and dependent on interpretation of the absolute size of level of transnationalization. More precise answers will take much more detailed analysis including simultaneous observation of several variables .
The very general answer as to the validity of the 'media imperialism thesis' as an explanation of transnationalization of *supply* of television in West Europe is that (1) even with a specified content of the 'thesis' the validity cannot be verified (or rejected) from existing *empirical* research for methodological reasons; (2) that existing data on transnationalization cannot be related to the 'intentional' element of 'media imperialism'; (3) that existing data are inconsistent with some of the economic elements of the thesis as to *total* supply but (4) consistent as to fiction programming - but to varying degrees dependent on a number of factors. 'Consistent' here means that the data can be understood from the the economic factors as they are outlined above.

Discussions of 'media imperialism' as a rule neglect the third element of explanatory factors proposed above, i.e., variables as demand, reception and gratification as determinants of transnationalization. However, it is suggested here that such variables must be incorporated in any attempt to understand transnationalization of both consumption and supply.
Though there are indications in this study of a certain correlation between transnationalization of supply and consumption it is also evident that transnationalization cannot be understood from supply factors only. There is enough nationally distributed and domestically produced supply in all West European countries to fill out the number of hours viewers spent on television consumption. Anyhow, viewers *do* choose to consume imported programmes on national television - though the extent of this consumption with

few exceptions is very badly illuminated by hard data (in the international literature). And in - the small - countries viewers do choose to consume television from neighbour countries and from Pan-European satellites - though again we do not know much about the amount or character of this consumption.

The few data available suggest a certain preference (as expressed in utilization measures) for US programming. However, I suggest that consumption of foreignly produced television should not be understood from nationality as much as from programme content, i.e., the preference for entertainment, and the perceived quality of entertainment. This is consistent with US fiction programmes - backed by high investments and a tremendous know-how - being popular all over West Europe. It is important for the understanding of transnationalization of consumption to test this hypothesis extensively[1].

In as much as little is known of transnationalization of consumption - and remembering the low transnationalization of supply in a number of countries - it is highly probable that transnationalization of consumption is small in some countries. Beside the lack of supply, viewer preferences must of course also be included to understand a possible low transnationalization of consumption.

The assumption that programming content (or perceived quality of programming) is a more 'basic' determinant of consumption than nationality of programming (which may be understood as *one* dimension of quality) directs the interest in consumption oriented determinants of transnationalization back to the (micro) economic arguments around transnationalization of supply.

Viewers turn to foreignly produced programmes because they cannot find enough home made quality products (or in some cases, e.g., Great Britain, because they find imported products to be of a superior quality or an appealing variety). A main reason for this is explained by economic factors.

Why the audience to a high degree turn to fiction and why especially US programmes are attractive are outside the scope of this study to answer. But the answers probably are at least as important for understanding transnationalization of consumption as is transnationalization of supply.

The importance of viewer preferences for understanding transnationalization of consumption *may* when related to the general issue of transnationalization be used as an argument against not only the ideological/intentional purposes of the exporters but also

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[1]Among the references of this study, Svendsen(1984) documents that the Danish viewers preferred Danish fiction to anything else and that they used (bilateral) Swedish and West German television for entertainment, fiction and sports. Westrell(1987) is another confirmation of the hypothesis related to multilaterally supply as is the data from the analysis of transnationalization of consumption of (nationally) distributed Danish television.

against critical interpretations of the economic conditions influencing transnationalization.

And then of course the whole issue of media imperialism and determinants of transnationalization of supply has nothing at all to do with the 'second level' effects which are related to transnationalization of consumption and the character of the consumed products. And this 'relation' is exactly the phenomenon that we know the least about!

CONSEQUENCES OF TRANSNATIONALIZATION

As mentioned at the beginning of this chapter the purpose of this section is to round off the review of first level effects of international television flows by a brief discussion of standard assumptions on the ultimate interest of research on international television flows, i.e., the 'second level' effects of transnationalization.

As already pointed out it is not possible *generally* to talk about consequences of transnationalization. It is necessary to specify the source of transnationalization since for example the cultural and economic consequences of a high T(n)-C may be very different from those of a high T(m)- C. And it is necessary to specify the subject since for example transnationalization of consumption implies more potential consequences than transnationalization of supply. Also the consequences of transnationalization of programme categories may vary widely. It may be the biggest general mistake in the relevant literature (cf. the list of References) to attempt to generalize about the effects of 'transnationalization'.

It is easy - too easy - to state for example that transnationalization negatively influences national, cultural and linguistic identity. The effects of course depend on the receiving culture, on the extent and character of transnationalization and on the national alternatives offered. In the small West European countries much transnationalization originates in related cultures and has a diversified national background. The consequences of transnationalization may be of a quite different character in the big countries relying on a few foreign sources or where one foreign country totally dominates the foreign element. Below the most often quoted effects of 'transnationalization' (in the list of References) are systematized and briefly analysed.

NEGATIVE EFFECTS OF TRANSNATIONALIZATION

In the relevant literature the dominant approach is to understand 'transnationalization' as US influence and to perceive the effects of transnationalization almost by definition to be negative[1].

One set of main arguments against transnationalization of television supply (and consumption) are related to *economic effects*. The key words are trade balance deficits, protection of national media industries, employment, economic activity, and the necessity of a home market to develop export incomes. From these concerns it is tempting to interpret the free flow discussion not as ideologically motivated but really as a free trade versus protectionism discussion in a very visible economic sector (see, e.g., Schiller,1981, page 18-21).

The economic arguments include the traditional moral viewpoints called upon in such economic discussions. An common argument is that products should not be sold to a price below their production costs - which is the case with all exported television products because of the unique character of television programmes which allows the same product to be sold again and again. Another example of moral-economic arguments is found in the defence for protectionist measures (quotas) which state that US programmes are not imported to other countries due to better *quality* but due to the low *prices* they are sold at after having earned the productions costs at the home market. (See, e.g.,Wiesand,1985, page 199). Economic explanations are also used in a misleading way when the argument jumps from the absolute economic value of the US television exports via 'imperialistic' motives to a dominating cultural influence from this export. There are many examples of this in the 'media imperialism' literature. (For a very clear example, see Varis and Guback,1982).

A second set of often quoted consequences is the *threat* of transnationalization *to national cultural identities*.

The assumptions are that the foreign (especially US) television imports imply a cultural, ideological influence and thereby a political and economic influence and that this is negative because the national cultures are valuable (or better than the foreign) and worth preserving. Critical and very interesting analyses of the generality of the last assumption can be found in Tunstall(1977), Mattelart et al(1984)[2] and Garnham(1987).

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[1] *Examples* of exceptions are Tunstall(1977); Mattelart et al(1984); Tracey(1985).

[2] It is interesting to compare Mattelart et al(1984) to Mattelart(1979). Both studies presupposes an undocumented quantity of foreign influence which is a threat to cultural identity but whereas the latest book is very critical toward this concept Mattelart(1979)

One might think that the problem of protecting national cultural identity is especially pertinent in small countries. However, the reviewed literature leave the impression that the big countries (probably for economic reasons[1]) are more preoccupied with protective policy measures than the small countries (Wiesand,1985)[2]. The issue is of course also discussed in the small countries but often they seem less 'scared' of the (potential) foreign influence, perhaps because they for a very long time have become used to drawing on inspiration from abroad and to resisting and surviving all kinds of physical, economic and cultural pressures. Most national cultures have developed historically through influence from outside. As one example the small, affluent and culturally relatively independent and integrated Denmark during the centuries has been under heavy German and French influence and in the 20th century under British influence which during the last thirty years gradually has been replaced by a US influence. Perhaps the present US cultural influence is not threatening the national cultural identity as much as the British influence on this identity.

Very often the validity of the 'cultural identity' argument is accepted without discussion. Pragnell(1985) calls the US share of West European television supply being "undue" and states that "..many broadcasters and commentators would fear that heavy viewing of programmes from other countries (particularly from the United States with its strong culture or variety of cultures) would over time erode the cultures, values and proper pride in their own traditions of the countries of Europe" (page 5).

Pragnell(1985) finds it positive that for example Brazil is more and more successful in exporting to Europe. This may be true from a diversity point of view. However, one cannot assume a priori that the quality of a Brazilian 'telenova' is better than that of a US soap. But this *is* assumed in the special understanding of cultural identity which is inclined to consider US cultural influence to be more dangerous than anything else.

This way of thinking supposes (1) a substantial amount of consumption of US television; (2) an effect of this consumption, and (3) that this effect will be an *acceptance* of the values present in US television programmes. This way of thinking was introduced in

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argues strongly for its preservation from a rather elitistic understanding of the nature of national culture.

Tunstall(1977) suggests a differentiated approach to the value of preserving national cultural identities, points to positive consequences of cultural exchange and to strongly opposing effects of the same influence in different cultures.

[1]See for example Garnham,1987, page 39.

[2]A recent typical expression of the concern on behalf of the small countries can be found in Pragnell(1985), stating page 10: "Both now and in the future it is the smaller country which is most likely to be at risk <concerning national culture>. A well-funded organization ought to be able to produce more and better programmes than one which is short of money. This means inevitably.....that the larger countries will be in a stronger position than the smaller ones to maintain amounts and standards of domestic production. They will thus be more able to withstand cultural effects of the material from abroad which they show."

the literature on international communication as early as 1962 (Schiller,1962, see ,e.g., page 92) and has especially recently been criticized by Tracey(1985) and Lealand(1984) stating that "There is an assumption that American television imports do have an impact wherever and whenever they are shown, but actual investigations (or verification) of this seldom occur. Much of the evidence that is offered is merely anecdotal or circumstantial" (page 6).

This assumption on cultural effects in the form of adoption of US values relies on the (primitive) 'hypodermic needle' theory of effects and also totally neglects the development of uses and gratifications theory and the so called reception studies which indicate the ability of viewers to interpret foreign influences in the framework of their own culture and thereby question some of the traditional assumptions on 'second' level effects[1]. A scientifically based knowledge on 'second level' effects must relate itself to the theoretical and empirical developments of mass communication research including traditional effect analyses, uses and gratification studies and reception studies.

It should be noted also that the concept of cultural identity needs much clarification. Normally it is related to national cultures but the issue of cross border sub cultures must be included. Are French teenagers culturally most close to their parents or to their US counterparts?

A third set of supposed effects of transnationalization - related to the 'cultural identity effects'- is the so-called *cultural standardization* caused by national producers who (to please the public or from economic motives) orientate themselves toward international markets and international market standards. In doing so they apply a cultural common denominator approach inspired by US production standards, especially in a situation of strong channel competition (see,e.g., **Many Voices**,1980). Another explanation is related to national producers who in their home countries try to imitate the US approach (see.e.g., Garbo,1984)[2].

The fear of standardization effects are typically stated like this:"We have the choice between a US-type of melting-pot philosophy resulting ultimately in a universal media civilization or a mosaic-type of societal philosophy with various groups and their coverage by the media running parallel to each other" (Bismarck,1984, page 17). And the typical

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[1]Some widely different examples of reception studies challenging traditional assumptions on 'second level' effects are Lull(1980); Liebes et al(1986); Morley(1986) and Bruhn Jensen(1986). This research tradition appears to be especially developed in the Nordic countries where such studies for example have been sponsored by Denmark´s Radio (Fabricius Jensen,1986; Bruhn Jensen,1987).

[2]It is interesting in this context that Mattelart et al(1984) discusses programme characteristics as explanations of the US success at the television world market *and* urges European television producers to learn the 'tricks' from their US counterparts.

misunderstanding which neglects the quantity and quality of influence and assume hypodermic needle effects may by represented by this comment to the US series Dallas and Dynasty: "Despite their entertainment quality these series show clearly why I shudder at the very thought of a uniform and mediocre "world-wide culture" offering exactly the same to people everywhere. If suggestive programmes of this type set the standards for success in the media scene, they are by all means in a position to run down like a flow of lava our cultural heritage that has grown over the centuries" (Bismarck,1984, page 3).
An interesting analysis of the standardization effects of multilaterally distributed television is Hoffmann-Riem(1985) which focuses on the lack of room for target oriented programming when aiming at international mass markets.
It is obvious that the potential effects of 'breaking down national cultural identity' and 'standardization of contents' depend heavily on the quantity and the dimension of transnationalization under observation. Also, the international literature so far has concentrated on the *national* supply which in principle can be regulated by national efforts whereas this is not to the same degree true of the bilateral and multilateral dimensions of transnationalization.

A fourth set of effects of transnationalization often mentioned in contributions on international communication flows is the creation of a *biased mental map* of the world. From what we known about transnationalization of supply this seem to be a reasonable consequence from the narrow selection of foreign suppliers and the minor role played by 'other' in all studies. If so, this effect should be much stronger in big than small West European countries.

A possible effect of transnationalization is the potential influence of the multilateral and bilateral dimension of transnationalization on *the time* used for television consumption. The availability of multilateral and bilateral television adds substantially to total television consumption - which must be directly related to cultural effects. (Recent documentation for this - concentrating on small West European countries - is Svendsen,1984; Westrell,1985, Bens and Knoche,1986; Haraldsen et al,1986; Hedman et al,1986; Gahlin and Nordström,1987; for an interesting illustration of the correlation between supply and consumption covering the whole of West Europe; see Syfret(1987).

Above I have *outlined* and to some degree challenged some of the most common assumptions on 'second level' effects of transnationalization. Without detailing the many other suggestions for potential effects of transnationalization it may be appropriate to point out the mistake of identifying the effects of transnationalization of television with

general effects of television[1]. However, the most important critique is the lack of systematic research based on empirical knowledge of transnationalization as a 'first level' effect.

POSITIVE EFFECTS OF TRANSNATIONALIZATION

The dominant position of most contributors to the discussion on international television flows is that West European viewers (and viewers all over the world) watch too much US television (and foreign television generally). I suggest that this argument can also be turned upside-down: the television viewers of the big West European countries (and the USA) are undernourished with foreign cultural influence.

The small West European countries receive relatively more foreign television than the big countries. But the supply in the small countries is also much more diversified with regard to national background. One might set up the hypothesis that transnationalization of television may diminish tne risk of television consumption contributing to development of culturally narrow, chauvinistic, provincial attitudes and increase the possibility of knowledge of and an open mind toward other cultures and societies.

[1]See, for examples Przeclowski(1982), Gallagher(1982) or **Many Voices**,1980).

Chapter 5

IMPLICATIONS FOR POLICY AND RESEARCH

A typical presentation of the television future of West Europe which alerts those interested in cultural and media issues can be summarized from Schrape(1987) writing on *supply* of television.

The Varis(1985) study from 1983 covered thirty-one channels and an accumulated output of 110,000 hours PER YEAR. The 33,000 hours or 30% were imported (from other West European countries, the USA and other countries).

According to Schrape(1987) in 1985 there were fifty-one channels with 186,000 hours of output PER YEAR. 45% or 84,000 were imported.

In 1986 there were sixty-one channels and 234,000 hours of supply. 50% or 117,000 hours were imported. 25% of the supply were repeats.

The growth in the number of channels from 1983 to 1986 comprised twenty-one private channels and three public service channels.

Schrape(1987) further adds a prognosis stating a supply of 350,000 hours in 1990 and a 50% import rate. Of these 175,000 hours the USA is expected to deliver half or three times as many hours an in 1986 when US imports made up for 22% of total supply in West Europe. Schrape(1987) stresses that this need for programming either implies economic losses to a number of (private) channels or reliance on very inexpensive programming imported primarily from the USA.

POLICY IMPLICATIONS

Data like the ones above scare many politicians from both a cultural and economic point of view. Not as much the growth in television supply as such but the growth in transnationalization and especially in the imports from the USA.

Media policy activity , therefore, is rather hectic at both the national and international level in these years in West Europe - as are the export oriented activities in the USA due to expectations of growing supply (and consumption) in West Europe.It is outside the objects and scope of this study to confront its conclusions with on-going media policy activities[1] or to suggest a detailed programme for policy measures. However, I have found it appropriate to outline some policy implications of the results of this study - and which more or less explicitly have been pointed out during the study. At a general level

[1]See Sepstrup(1989) for an analysis of the EEC media policy

the following observations are relevant to both national and international policy measures. It can be no surprise that these broad observations are not necessarily all compatible!

* Qualified policy decisions - especially at the international level - need to be based on much more research generated knowledge, especially on the character of actual consumption and the cultural, economic and social consequences of this consumption.

* Cultural and social consequences of transnationalization and motives for policy measures must be sharply distinguished from economic consequences and motives.

* Related to television supply and television consumption the West European countries must be approached individually. It is a mistake to perceive them as one homogeneous cultural, social and economic unit.

* One cannot generally and a priory assume the 'quality' of television products from specific countries to be better or worse than that from other countries. The 'quality' of a programme must be evaluated individually.

* Whether the seemingly general agreement to limit the US share of transnationalization in West Europe is justified or not (potential) protective measures must be supplemented with more positive actions oriented toward a broader national diversity of transnationalization. This is especially true for the big countries where it may be necessary to subsidize such imports.

* In the small countries a positive supplement to (potential) measures to limit the US (UK) share of imports will be to subsidize national productions for television.

* Whatever the decisions will be on the issues mentioned here special attention must be given to entertainment/fiction programmes. Special attention should also be given to the almost non-researched issue of transnationalization of children´s programming and the relatively in-depth researched transnationalization of individual news productions.

* It appears close to be impossible to promote (private) Pan-European television and commercialization of national television *and* to reduce transnationalization dominated by the big exporting countries.

* Given an intention to regulate the share of transnationalization ascribed to the big exporting countries, activities must concentrate on the extent and the activities of commercial television and on support to public service broadcasting.

RESEARCH

This study has continuously pointed out the weaknesses of existing research and suggested alternatives. I will therefore only briefly summarize the most important conclusions for future research.

It is indisputable that much more systematic research of empirical nature is needed on the consequences of international television flows. Today speculations and guesses are far too dominating. The practice of cross cultural communication is far ahead of knowledge of the effects.

Future research must relate to some kind of generally accepted framework along the lines suggested here. 'First and second' level effects must be clearly separated. The dimensions and subjects of transnationalization must be specified and related to programme contents, consumption, perception and gratification. Local and regional television and bilaterally and multilaterally distributed television must be incorporated. Much more work must be invested in identifying the determinants of transnationalization of supply together with the reception oriented determinants of consumption and of course the cultural, economic and social consequences of this consumption. Especially, the role of commercialization for both 'first and second' level effects must be given a very high priority in research.

These summarized, general 'recommendations' and the more specific suggestions during this study can be implemented in public and private audience research and in individual projects. However, substantial developments of research on international television flows can only be achieved by broad international approaches - executed centrally by international organizations, preferable UNESCO - and not limited in scope because of the size of land they are to cover. The amount of impressionistic research is large enough. If research of that nature is the result of global approaches by individual researchers or international organizations, regional or subregional or even national surveys must be preferred to obtain the necessary in depth quality.

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Annex 3, Table 4: Imported shares of supply of nationally distributed television hours in sixteen West European countries, 1982.

Country (No of respondents, i.e., channels)	T(n)-S Total supply of hours per year	T(n)-S Imported hours per year	T(n)-S Imported hours % of supply
Austria	6,973	2,371	34
Belgium (2)	8,104	2,597	32
Cyprus	2,358	1,344	57
Denmark	2,636	1,001	38
Finland (2)	4,543	1,689	37
France (2)	6,216	891	14
Great Britain (2)	15,026	2,361	16
Ireland	5,576	3,234	58
Italy (3)	11,552	1,420	12
Netherlands	5,057	1,517	30
Norway	2,443	1,002	41
Portugal (2)	6,447	2,375	37
Spain	6,153	2,030	33
Sweden	4,529	1,991	44
Switzerland (3)	10,760	4,214	39
West Germany (2)	7,124	1,371	19
Total	95,813	31,408	33

Calculated from Pragnell (1985) Table 3 which give the data for individual channels.
Based on data for one year.

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ANNEX 1:
BACKGROUND OF EMPIRICAL RESEARCH ON TRANSNATIONALIZATION OF NATIONALLY DISTRIBUTED TELEVISION

The empirical studies have contributed information as follows from the summary below:

Summary of transnationalization measures covered by the empirical research on nationally distributed television reviewed in this study:

Reference	Many countries	Few countries	One country	I(n)-S	I(n)-S/CO	I(n-S) programme categories	I(n-S) time periods	I(n)-C	I(n)-C/CO
1970-72 Nordenstreng and Varis, 1974	x			x					
1977 Chapman et al, 1980		x		x	x	x	(x)		
NOU, 82:30			Norway	x	x				
1980 Mills, 1985		x		x	x			x	x
1981 Mills, 1985	x			x					
1982 Pragnell, 1985	x			x	x	(x)	x		
1983 Varis, 1985	x			x	x	x	x		
Sarkkinen, 1984			Finland	x	x		x		
Schlesinger. 1986			Great Britain	x	x	x			
1984 Sarkkinen, 1984			Finland	x	x		x		
1985 Westrell, 1987			Sweden	x		x			
EBU Statistics	x			x	x				
1986 Television programming, 1987	x			x	x		x		
1984-87 This study			Denmark	x	x	x	x	x	x

NORDENSTRENG AND VARIS,1974

The data of this study are based on a questionnaire mailed to eighty countries in 1971. The data gathering process was finished in 1973.

Data from this study are only quoted in Table 1 and mostly for historical reasons. Until the beginning of the 1980:s these data were the only ones available and the main conclusions[1] of this study have dominated the understanding of international television flows until they were further confirmed in 1985 (Varis,1985). Due to the pioneering status of this study and the need for empirical facts its data and conclusions have been uncritically quoted in more and more condensed forms.

The data are always related to 1973 but are from a number of different one or two week periods from 1970-72. Because of the limited size of the sample the authors have warned about the data being "fairly representative" (page 8) and "rough estimates" (page 11).

The absolute figures behind the data in Table 1 are shown in Annex 3, Table 1. The overall conclusions of the study do not apply very well to the West European scene. Only four countries are below the West European average of transnationalization and the T(n)-S varies from 23 to 67% among the small countries. And if looking at the absolute number of imported hours per national channel there are only a few significant differences between the countries.

The need for consumption data, was perhaps for the first time stated in this study: "It would be important ... to weight their <the programmes> social significance by regarding also the size of audience exposed to them" (page 11).

CHAPMAN ET AL,1986

These data are from the European contribution to the "International Television Flows Project". The most accessible description of the work of Chapman et al(1986) is Chapman(1987). Basically data was collected for six weeks in 1977 from the national broadcasters in Italy, Great Britain, Ireland, Norway, Sweden and Denmark. (The Danish data were never processed).

The cornerstone of the study is the delicate and complicated analysis of programme categories (see primarily Gould(1984) and secondarily Chapman(1987) combined with a detailed breakdown on channels, weeks, days and time of day. It is very difficult for an

[1]The main conclusions are that (a) the international flow of television programmes is a one-way street from the big exporting countries to the rest of the world and (b) the flow is dominated by entertainment.

observer to follow the immense amount of analysis and computations behind the data presented in Chapman et al(1986) which is literally a six volume print of a database orientated toward multipurpose usage. The authors present the data in a detailed basic way and the rest is up to the potential user of the data.

The processing of the data is not very transparent. The results are fairly consistent with other observations. It is an advantage that the Chapman et al(1986) study explicitly compares small and big countries. The reason for not going deeper into this here is the age of the data and the different approaches to the gathering and processing of data from different channels and countries.

Data on both domestic and imported programmes were collected for all countries. For some countries these data are from the same weeks but for others they are from different sets of weeks and in some cases only data on imported programmes were collected. Another complication is that some data were collected in 1977 and others in 1979. The enormous amount of data and these complications makes it difficult to establish the kind of data needed for this study . Anyhow, it has been possible here to create a limited sample of consistent and comparable data - at the price of loosing some information.

NOU 1982:30

The data used here are from a government report on the power of mass media in Norway. There is no information on the reliability of the data which most probably have been produced from the Norwegian public service broadcaster's programme statistics for a full year. For the use here the data have been supplemented with an estimated total number of hours broadcasted.

MILLS,1985

The background data used from Mills(1985) for 1980 and 1981 are neither discussed nor explained but just referred to as data from EBU's GEAR-group and EBU's annual programme statistics - which are confidential. The EBU statistics cover a full year and are the only longitudinal data available. However, the procedure for being permitted to quote these data was so complicated and uncertain that I abandoned to take advantage of these data. This decision was supported by the fact that the relevant data are only available from a changing number of EBU members over the years and because they only allow calculations of a very uncertain T(n)-S since imported hours are the exact hours of

television imported, whereas supply data include repeats. In this way T(n)-S is underestimated to varying degrees. This is probably also the case for the data quoted by Mills(1985). The latest data from EBU I have seen (1985) generally support the level of the data in the last column in Table 1.

PRAGNELL,1985

The data from Pragnell are based on a questionnaire sent to twenty-six European based members of the EBU at the end of 1983 asking for information on the composition and sources of their programmes for 1982. Twenty-three respondents returned the questionnaire which is reprinted in Pragnell(1985). (For the purpose of this study only fifteen of the data sets can be used). The respondents were asked to use the EBU definitions of programme categories. There is no information on the sources of the respondents and the problem of repeats (see Mills,1985 above) which one might suspect is not consistently solved since it would be the easiest for most broadcasters to rely on the same sources they used to prepare the contributions to the EBU statistics.
The data are reported per channel in Pragnell(1985) with few details and very little information on absolute figures and totals. The questionnaire indicates that much more information should be available but for reasons not stated this information is not reported. Schlesinger(1986) is surprised by the different levels of T(n)-S/CO in West Europe obtained by Pragnell(1985) and Varis(1985). Considering the measures used and the different methodological approaches and considering the fact that the data are from two different years I find it more important to stress that to a high degree the two studies support each other.

VARIS,1985

Varis(1985) is a UNESCO-sponsored replication of the also UNESCO initiated Nordenstreng and Varis(1974) study based on two weeks in 1983. The West European part of the study covers 390 broadcast hours (Varis,1984). The only information in Varis(1985) on the data gathering process is that the categorization of programmes follows the UNESCO recommendation, a reprint of the questionnaire and the statement that "...regional centres chosen by UNESCO for their qualifications and experiences were responsible for collecting the data from their respective regions in collaboration with other institutes" (page 16). There is no information on who filled out the questionnaires from what sources and it is not possible to tell from the questionnaire whether the

'repeats problem' mentioned above (cf. Mills,1985) has been solved. Most likely this changes from respondent to respondent when relying on broadcasters without explicitly tackling the problem. Except for -channel countries with *several* respondents it is not specified which channel(s) the data cover.

SARKKINEN,1984

These data from 1983-84 are from an official programme statistics publication issued by the Finnish public service broadcaster YLE. The data are specified for the two national channels and cover a full year.

SCHLESINGER,1986

Schlesinger(1986) has no information on the origin of the data used here, except that they are quoted from **A Report from the Working Party on New Technologies**. Broadcast Research Unit, London,1983.

TELEVISION PROGRAMMING IN EUROPE...,1987

This is a commercial study. Data from the 1986 edition are not included due to restrictions on use of the data whereas the 1987 edition is not restricted. The information on the methodology of the study is limited and it is especially a weakness that no absolute data are reported at all. Because of this the individual channel data cannot be transformed to national measures as it has been possible with all other studies.

The data were gathered in all countries during the same week in September 1986 which was "representative of mainstream programming patterns at the beginning of the Autumn season and was almost entirely free of 'atypical' programming" (page 7). Anyhow, the study also illustrates that one week is not a very reliable sample. For example the report stresses that SVT1 had no import from the USA and that DR had doubled the import from the year before. However, these observations have no relation to the realities of the whole year.

Programming information was gathered from local published sources, mainly TV programme magazines, and Young and Rubicam/Horizon offices in each country supplied information on programme classifications and country of origin to a pre-set matrix.

Definitions of classifications and method of identification are not reported. The reliability of the data of the study is difficult to estimate. The study is unique in comparing both public and private, advertising and license fee financed stations on the same criteria from forty-one television stations in thirteen West European countries and two Pan-European channels.

WESTRELL,1987

This study (also reported in Westrell,1986) provides a total figure for T(n)-S and for transnationalization of ten programme categories but do not specify the national background of imported hours. The research was carried out for the Audience Research Department of Sweden´s Radio and based on supply and consumption in one week among cable subscribers in the city of Borlänge, Sweden, November 1985. The data on consumption are from telephone interviews with a representative sample of 375 persons, age nine and up.

TRANSNATIONALIZATION OF DANISH TELEVISION 1984-87

The data from this study are based on the audience research data of Denmark's Radio, i.e. ratings and consumption measured in minute which were related to time of day, the country where the programme had been produced, and the category in programme production statistics to which the programme belongs. By developing new approaches to the data processing it was possible to pool four years of audience research and from this set of data to calculate the measures suggested in this study.
The results presented here are based on ten weeks of regular audience research carried out in the weeks No 7, 31 and 48 from 1984, 1985 and 1986 and week 7 from 1987. The ten weeks constitute a sample of 36.620 minutes or approximately 610 hours for description of the supply side. The ten weeks are to be understood as a sample of the January 1984 - April 1987 population. The statistical uncertainty on observations based on this sample is related to the representativeness of the 610 hours compared to the total supply. During the years the weeks 7, 31 and 48 have been carefully selected by the research department of Denmark's Radio to create the best possible sample of a year. By using 1984-87 as the population the influence of special events is reduced. To check the reliability of the supply data the T(Denmark)-S/Nordic countries based on this approach has been checked against the total record of Denmark's Radio's supply of Nordic programme hours kept by the Nordvision[1] secretariat. This is a good test as the Nordic

[1]The cooperative body of Nordic programme exchange.

share of supply is known to be small. For each of the years the deviations between the sample (1%, 5% and 4%) and each of the years according to the Nordvision statistics (4%, 4%, 4%) is considerable. For the whole sample the result is 3.2% compared to the true 4%[1].

The information on consumption of the 610 hours is based on the pooled consumption data from the ten weeks. The data for each week are based on a sample of approximately one thousand persons representative of the population over thirteen years. In this way the consumption data are based on a sample of 9,854 different persons which means that the statistical uncertainty for practical purposes can be neglected.

Denmark's Radio's research department has participated in the analysis of the audience research data as part of the internal research and development process and has contributed two thirds of the costs involved. The head of research - Erik Nordahl Svendsen - offered valuable advice. The Aarhus School of Business Administration and Economics covered the remaining costs.

OTHERS

Beside the data used in this study it is possible to find a few isolated relevant West European data of unknown reliability in a number of research publications on international communication flows as for example Mattelart(1979), Lee(1980), **Japanese Television**(1982), Garbo(1984), Mattelart et al(1984).

Since one might expect the opposite it should be stated explicitly that there is no relevant *data* background in well known publications (some with a global approach) such as Schiller(1969, 1973, 1976); Tunstall(1977); **Many Voices**(1980); Guback and Varis(1982); Hamelink(1983) or **Television without frontiers**(1984).

A relevant and interesting background study is Hultén and Hultén(1986) which reports on the Intelsat flows of television in 1986 compared to the same flows in 1982. The study measures point-to-point and multipoint flows between borders, before they so to speak become an element of transnationalization. Considering all reservations the study demonstrates a significant growth in international distribution of television hours, especially *from* West Europe *to* the USA.

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[1]The true figure for 1983 is 4%. The two week sample of Varis(1985) reaches 6% and the three week sample of Denmark´s Radio shows a Nordic share of supply of 1%.

ANNEX 2:

A SHORT NOTE ON EXPORT DATA

It is near at hand to expect export data to play a significant role in research on transnationalization of television. And traditionally there has been a high interest in the relevant literature in export data. However, there are very few comprehensive and reliable data available. This may be due to practical purposes (see Schlesinger,1986) or due to the difficulty of identifying measures of export (transnationalization of domestic production) which are relevant to 'second level' effects. Sales value may be interesting for some purposes and the only way to compare imports and exports and to compare nations. But value is not interesting from a cultural effect point of view. Also the number of television hours is a dubious measure. A quote from the pioneering Nordenstreng and Varis(1974) study illustrates this: "It would seem that the *total* export of British programmers...does not exceed 30,000 hours as long as American sales are not multiplied by the number of network affiliates. If <so>...the total of TV station hours sold in the United States *alone* would be over 30,000" (page 33, my emphasize).

Another warning about the limited value of information on exported hours is also found in the first empirical study on this subject. Page 32, Nordenstreng and Varis(1974) identifies the US production of television hours as 163,900 per year and page 31 the US export of television hours is estimated to be between 100,000 and 200,000 hours per year. Even when neglecting the uncertainty it is difficult to see what can be learned (about 'second level' effects) from knowing that between 61% and 122% of the production is exported. However, it is especially the total amount and value of US exports of television hours that have been used as an illustration of the influential or dominating international role of US television. (For an example, see Guback and Varis,1982).

In the literature on international television flows there is no comprehensive systematic study on exports of television hours but scattered data on especially US exports are often found. See for example Nordenstreng and Varis(1974); Guback and Varis(1982); Mattelart(1979); Mattelart et al(1984) and Schlesinger(1986). **Japanese Television**(1982) has so detailed information on Japanese import of television hours that it is possible to identify the exports from a number of countries to Japan. Chill(1983) has some data on US exports but concentrates mostly on explaining the domestic (business) determinants of this export.

To sum up: for the purpose of this study export data do not contribute to further understanding.

ANNEX 3:

BACKGROUND, DETAILS AND ABSOLUTE DATA RELATED TO TABLES 1-26

Annex 3, Table 1: Imported shares of supply of nationally distributed television hours in twelve West European countries and four big 'television countries'. 1970-72.

Country	I(n)-S			
	Total supply of hours per year	Imported hours per year	Imported hours per national channel	Imported hours % of supply
Finland	3,500	1,400	700	40
France	5,400	486	162	9
Great Britain	14,450	1,809	603	13
Iceland	1,050	704	704	67
Ireland	2,200	1,188	594	54
Italy	4,500	585	195	13
Netherlands	3,400	782	391	23
Norway	2,000	780	780	39
Portugal	4,200	1,470	735	35
Sweden	4,350	1,436	718	33
Switzerland	3,100	744	248	24
West Germany	5,200	1,400	700	27
West Europe	53,350	12,784	-	24
Canada	9,550	3,931	-	41
USA	163,900	2,230	-	1
Australia	290,670	165,682	-	57
Japan	12,900	894	-	7

From Nordenstreng and Varis (1974) Table 2 or calculated from this (last column).
Based on data from one or two weeks in 1970, 1971 or 1972.

Annex 3, Table 2: National background of imported, nationally distributed television hours to six West European countries. 1977.

T(n)-S/CO and T(n)-S

Importing country

CO = Country of Origin	Norway			Sweden			Finland			Ireland			Great Britain			Italy		
	hours imported	% of supply imported	% of imported hours	hours imported	% of supply imported	% of imported hours	hours imported	% of supply imported	% of imported hours	hours imported	% of supply imported	% of imported hours	hours imported	% of supply imported	% of imported hours	hours imported	% of supply imported	% of imported hours
Austria	1,25	0.5	1.3	-	-	-	0,10	0.0	0.1	-	-	-	-	-	-	-	-	-
Belgium	-	-	-	1,06	0.2	0.5	1,45	0.4	0.9	-	-	-	0,12	0.0	0.1	2,43	0.3	1.9
Denmark	6,40	2.5	6.1	9,21	1.7	4.5	2,55	0.6	1.4	0,20	0.1	0.1	-	-	-	-	-	-
Finland	0,50	0.3	0.8	19,15	3.6	9.3	11,50	2.5	5.8	0,30	-	0.1	-	-	-	2,40	0.3	1.9
France	7,45	3.0	7.1	13,34	2.5	6.5	23,00	4.8	11.3	2,30	0.4	0.6	2,22	0.4	1.4	20,53	2.3	14.9
Great Britain	20,35	7.9	18.9	62,08	11.5	30.0	41,10	8.6	20.2	189,49	33.8	47.0	9,35	1.5	5.8	22,50	2.5	16.2
Greece	-	-	-	0,10	0.0	0.1	-	-	-	-	-	-	-	-	-	-	-	-
Italy	4,10	1.6	3.8	7,55	1.5	3.8	12,40	2.7	0.2	-	-	-	3,51	0.6	2.3	5,53	0.6	4.2
Iceland	1,20	0.5	1.2	0,21	0.1	0.2	-	-	-	1,30	0.3	0.4	-	-	-	0,55	0.1	0.7
Ireland	-	-	-	0,23	0.1	0.2	-	-	-	1,00	0.2	0.2	0,38	0.1	0.4	-	-	-
Norway	7,50	3.0	7.2	1,49	0.3	0.9	6,05	1.3	3.0	2,35	0.5	0.6	-	-	-	0,38	0.1	0.5
Netherlands	-	-	-	1,35	0.3	0.8	0,50	0.2	0.4	1,35	0.3	0.4	0,46	0.1	0.5	-	-	-
Portugal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Spain	0,40	0.3	0.6	2,10	0.4	1.0	-	-	-	-	-	-	0,25	0.1	0.2	-	-	-
Sweden	10,30	4.0	9.6	3,29	0.6	1.7	29,10	6.1	14.3	-	-	-	-	-	-	1,20	0.1	0.9
Switzerland	1,25	0.5	1.3	1,33	0.3	0.7	0,55	0.2	0.5	-	-	-	-	-	-	1,58	0.2	1.4
West Germany	4,35	1.7	4.2	8,34	1.5	4.0	6,20	1.3	3.1	0,45	0.0	0.2	-	-	-	5,11	0.6	3.7
West Europe	67,40	25.9	62.0	133,50	24.6	64.5	136,50	28.7	67.2	201,19	35.4	49.2	17,53	2.8	10.6	65,01	7.2	46.2
USA	17,22	6.6	15.9	46,50	8.6	22.6	31,10	6.5	15.3	171,27	30.6	42.4	92,25	14.6	55.2	68,34	7.6	48.8
Australia	7,33	2.9	6.9	-	-	-	-	-	-	18,54	3.4	4.7	12,13	1.9	7.3	-	-	-
Canada	0,40	0.3	0.6	7,29	1.4	3.6	3,45	0.8	1.8	2,10	0.4	0.5	6,11	1.0	3.7	1,10	0.1	0.8
Japan	0,45	0.3	0.7	0,40	0.1	0.3	0,30	0.1	0.2	-	-	-	-	-	-	-	-	-
Latin America	1,30	0.6	1.4	3,04	0.6	1.5	2,20	0.5	1.1	-	-	-	-	-	-	-	-	-
Eastern Europe	11.35	4.4	10.1	14,30	2.7	7.0	26,15	5.5	12.9	2,30	0.4	0.6	0,35	0.1	0.3	3,06	0.3	2.2
Africa	1,30	0.6	1.4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Asia	0,30	0.2	0.5	-	-	-	-	-	-	0,45	0.0	0.2	-	-	-	0,15	0.0	0.2
Middle East	-	-	-	0,17	0.1	0.1	-	-	-	-	-	-	1,06	0.2	0.7	0.05	0.0	0.1
Unknown	-	-	-	1,09	0.2	0.6	2,45	0.6	1.4	9,10	1.6	2.3	36,54	5.8	22.1	2,22	0.3	1.7
Others	24,03	9.3	21.6	207,22	5.1	12.9	35,35	7.5	17.4	33,29	5.8	8.3	56,59	9.0	34.1	4,18	0.8	5.0
Total import	109,16	42	100	195	38	100	188,00	42	100	404,00	72	100	138,00	26.3	100	140,33	15.5	100
Total supply		262			542			477			561			635			898	

Calculated from Chapman et al (1986), vol. 2-4.
Based on data from six weeks. Countries not included have not been imported from. Norway and Great Britain (ITV) are represented by one channel each. The source specifies data from two channels in the other four channels, all public service channels. 1,25 hours = 1 hour and 25 minutes.
Imported hours from the importing country itself represent co-productions.

Annex 3, Table 3: National background of imported nationally distributed television hours in Norway. 1982.

CO: Country of Origin	T(n)-S/CO		
	Imported hours	Imported hours: % of total supply[1]	Imported hours: % of import
Sweden	117	5	13
Denmark	45	2	5
Finland	28	1	3
Island	3	<1	<1
Nordic countries	193	8	21
Great Britain	268	11	30
West Gremany	68	3	8
France	39	2	4
Benelux countries	21	1	2
Other W. Europe	69	3	7
Western Europe	465	19	51
Eastern Europe	31	1	3
USSR	20	1	2
Canada	16	1	2
Latin America	1	<1	<1
Africa	2	<1	<1
Asia	4	<1	<1
Oceania	9	<1	1
Others	52	2	6
USA	165	7	18
Total	906	38 = T(n)-S	100

From: Maktutredningen. Rapport om massemedier. NOU 1982: 30, Table 19.2.
Based on data for one year.
1: Apporximately 2, 400 hours.

Annex 3, Table 5: National background of nationally distributed television hours in fourteen West European countries. 1983.

CO = Country of Origin	I(n)-S/CO and I(n)-S % of supply													
	Austria	Belgium	Denmark	Finland	France	Great Britain	Iceland	Ireland	Italy	Netherlands	Norway	Spain	Sweden	West Germany
Benelux countries	0	<1	1	1	0	0	0	0	0	0	0	0	0	0
France	2	4	2	3	/	<1	2	2	3	1	<1	3	1	1
Great Britain	3	7	12	5	1	/	22	16	4	5	10	8	6	2
Italy	1	<1	0	2	0	0	0	0	0	<1	0	2	2	<1
Nordic countries[1]	0	1	4	4	0	1	7	1	0	<1	<1	2	0	4
West Germany	10	4	5	4	1	<1	8	1	1	2	2	1	0	/
Other West European countries	0	<1	1	0	0	0	0	2	0	<1	0	0	2	2
West Europe	16	16	25	19	2	1	39	20	8	8	14	14	16	5
East Europe	0	1	<1	1	1	<1	1	<1	0	0	1	0	1	1
USA	10	8	12	11	10	12	19	34	8	9	6	16	9	12
Others[2]	1	2	2	3	1	1	0	3	2	2	5	1	5	0
Coproductions	7	0	0	0	2	0	7	0	0	3	0	<1	0	0
Eurovision	9	2	0	3	1	<1	0	0	0	3	4	2	5	0
Total supply of hours (2 weeks)	244	320	118	178	411	613	56	226	455	208	106	245	188	222
Total import of hours (2 weeks)	105	93	44	66	70	92	37	129	82	52	32	81	66	40
Imported hours % of supply: I(n)-S	43	29	39	37	17	15	66	57	18	25	30	33	35	18

Calculated from Varis (1984), all tables.
Based on two channels in Belgium and Great Britain (BBC 1 & 2), one in other countries.
No information on Switzerland. The data are based on one year.
1: Mostly Sweden.
2: There may be East European, Nordic and Benelux countries among 'others'.

Annex 3, Table 6: National background of imported nationally distributed television hours in fourteen countries. 1983.

	T(n)-S/CO % of imports													
CO = Country of Origin	Austria	Belgium	Denmark	Finland	France	Great Britain	Iceland	Ireland	Italy	Netherlands	Norway	Spain	Sweden	West Germany
Benelux countries	0	1	2	3	0	0	0	0	0	0	0	0	0	0
France	5	15	5	7	/	3	3	0	15	4	1	8	3	7
Great Britain	7	23	27	14	4	/	35	28	21	21	32	24	16	13
Italy	2	5	0	5	0	0	0	0	0	2	0	5	7	<1
Nordic countries[1]	0	2	9	10	0	7	10	2	0	2	6	0	14	<1
West Germany	23	11	11	11	7	3	12	2	5	8	7	3	0	/
Other West European countries	0	<1	3	0	0	0	0	3	0	1	0	0	5	8
West Europe	37	57	57	40	11	13	60	35	41	38	46	40	45	28
East Europe	0	2	1	3	6	2	1	1	0	0	2	0	2	6
USA	23	29	26	29	58	78	29	59	48	34	20	33	25	64
Others[2]	3	4	5	9	7	5	0	5	11	7	18	3	14	0
Coproductions	17	0	0	0	13	0	10	0	0	10	0	2	0	0
Eurovision	20	5	0	9	5	2	0	0	0	11	14	7	14	0
Total	100	97	89[3]	100	100	100	100	100	100	100	100	100	100	100
Total imported hours (two weeks)	105	93	44	66	70	92	37	129	82	52	32	81	66	66

From Varis (1984), all tables.
The data are from two weeks and based on two channels in Belgium and Great Britain (BBC 1 & 2), one in other countries. No information on Switzerland.
1: Mostly Sweden.
2: There may be East European, Nordic and Benelux countries among 'others'.
3: Varis (1984), page 18 state the sum to be 100 which it is not.

Annex 3, Table 7: National background of imported nationally distributed television hours in Finland. 1983-84.

CO: Country of Origin	1983 Imported hours % of total supply	1983 Imported hours % of imports	1984 Imported hours % of total supply	1984 Imported hours % of imports
Sweden	3.9	10.5	3.9	9.8
Norway	1.0	2.7	1.3	3.2
Denmark	1.3	3.6	0.8	2.1
Iceland	0.0	0.0	0.1	0.3
Nordic countries	6.2	16.8	6.1	15.4
Great Britain	7.4	20.0	7.1	17.8
France	2.0	5.2	1.8	4.6
W. Germany	2.4	6.6	2.6	6.5
Italy	0.7	1.8	0.6	1.5
Netherlands	0.4	1.0	0.5	1.2
Belgium	0.2	0.5	0.2	0.6
Austria	0.3	0.7	0.2	0.5
Switzerland	0.4	1.0	0.1	0.4
Spain	0.1	0.4	0.5	1.4
Portugal	0.1	0.1	0.0	0.0
Western Europe	20.2	54.1	19.8	49.9
USA	10.7	28.6	13.0	32.9
Eastern Europe	3.0	7.5	2.7	6.8
Canada	0.6	1.6	0.7	1.8
Latin America	0.1	0.4	0.2	0.5
Japan	0.4	1.1	0.5	1.2
Other Asia	0.2	0.5	0.2	0.5
Australia	0.7	2.5	0.6	1.5
Arab States	-	-	-	-
Africa	0.1	0.3	-	-
Exchange and joint productions	3.0	3.9	1.9	4.8
Total	T(n)-S = 39% = 1,525	100	T(n)-S = 39% =,I,708	100

Calcualted from Sarkkinen (1986), Tables 13 and 14 which have information from each of the two national channels. The data are for a full year. International sporting events are excluded from the import data.

Annex 3, Table 8: National background of nationally distributed television hours in twelve West European countries (twenty-six channels). 1986. All hours and prime time1.

T(n)-S/CO and T(n)-S

% of supply

Country	Domestic	Great Britain	West Germany	France	Italy	Nordic countries	Benelux	Other W.E.	West Europe total	USA	East Europe	Others	Total imports	Domestic Import
Austria														
FS1	68/77	3	14/17	2	2				21/17	8/6		3	32/23	100
FS2	53/52	3/2	11/17		5/2				19/21	23/25		5/2	47/48	100
Belgium														
BRT	81/75	6/9							6/9	10/4		3/2	19/15	100
RTBF	84/79	4/8		5/10					9/18	7/3			16/21	100
Denmark														
DR	62/80	7/3		3/2	2/3	14/6	1/1		27/15	9/5		2	38/20	100
Finland														
YLE1	53/51	8/12	1		3/2	7/5	3/5		22/24	17/17	4/4	4/4	47/49	100
YLE2	55/56	10/17	5/4	2/4	3	7/5		2/1	29/31	11/12	4	1/1	45/44	100
France														
TF1	80/78	1			4/3				5/3	15/19			20/22	
A2	91/94	1/1			2				3	5/5		1	9/6	
FR3	80/81	8/2	1/3						9/5	11/14			20/19	100
Great Britain														
BBC-1	87/87			1					1	12/13			13/13	100
BBC-2	87/78									12/16		1/6	13/22	100
ITV	91/95										6/5	3	9/5	100
Channel 4	65/74					1/1		1	2/1	29/9		4/6	35/16	100
Italy														
RAI1	80/76	2					2/4		4/4	16/20			20/24	100
RAI2	72/48	2	6/27	1/3					9/30	19/22			28/52	100
RAI3	91/90	2							2	7/10			9/10	100
Netherlands														
NL1	70/77	1/3		1		2/2			4/5	23/18		3	30/23	100
NL2	73/60	9/23			2		1/1	3/5	15/29	8/16		4/5	27/40	100
Norway														
NRK	63/70	11/9	2	1	1	4/3			19/12	15/12	1/2	2/4	37/30	100
Spain														
TVE1	82/90	2	1		1				4	12/10		2	18/10	100
TVE2	66/68			3/2					3/2	19/20		12/10	34/32	100
Sweden														
STV1	78/67	5/11	9/12	3/4	2/4	2/2		1	22/33				22/33	100
STV2	71/70	4/4	2/1	1/2	2/4	1			10/11	14/15	2	3/4	29/30	100
West Germany														
ARD	80/71	3		1					4	15/29	1		20/29	100
ZDF	86/90	2/3		2	2				6/3	7/7		1	14/10	100
Total[2]	74								12	12		2	26	100

Calculated from Television Programming..., 1987, page 19-69 (no absolute data available). The data are based on one week in september 1986. The groups of countries used here are specified in the source. There was no supply in empty cells.

1: Where one figure only it covers all hours; where two figures the one to the right is prime time, i.e., 6.30pm to 10.30pm.

2: My estimate from available data.

Annex 3, Table 9: Share of drama programming hours produced domestically and imported from the USA and 'other countries' in seven West European countries. 1982.

Country	Total supply hours	Drama supply hours	Drama supply % of supply	T(n)-S/CO, drama from USA hours	USA % of drama supply	Other foreign hours	Other foreign % of drama supply	Domestic supply hours	Domestic supply % of drama supply
Denmark	2,636	552	21	131	24	158	29	263	48
Great Britain	9,662	1,932	20	1,063	55	96	5	773	40
Finland	3,643	546	15	109	20	291	53	146	27
Netherlands	5,057	1,061	21	556	52	404	38	101	10
Norway	2,443	463	19	146	32	293	63	24	5
Portugal	6,447	1,418	22	709	50	580	41	129	9
Sweden	4,987	947	19	299	32	449	47	199	21
7 countries	34,875	6,919	20	3,013	44	2,271	33	1,635	23

Calculated from Pragnell (1985), Tables 3, 4a and 4b.
Data based on one year.

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Annex 3, Table10: Programme categories' shares of total supply of television hours in five programme categories in eighteen West European channels. 1983.

Country	% of supply										Total		
	Informational		Educational		Cultural		Children's		Entertainment		Hours	% of supply[1]	T(n)-S[2]
Austria	29	(8)	6	(2)	6	(26)	7	(35)	47	(77)	242	95	43
Belgium (BRT)	27	(4)	22	(<1)	6	(27)	4	(33)	38	(63)	149	97	28
Belgium (BRTF)	26	(6)	13	(<1)	6	(30)	4	(30)	48	(49)	173	100	29
Denmark	17	(<1)	8	(<1)	10	(15)	14	(43)	49	(68)	106	98	43
Finland	33	(16)	9	(30)	1	(<1)	8	(30)	45	(56)	179	96	37
France	40	(<1)	2	(<1)	7	(<1)	8	(34)	34	(40)	419	91	17
Great Britain (BBC)	30	(<1)	18	(<1)	4	(6)	9	(9)	37	(37)	395	98	15
Great Britain (ITV)	33	(<1)	11	(<1)	1	(<1)	10	(10)	42	(30)	249	97	14
Great Britain (Channel 4)	30	(<1)	1	(<1)	4	(<1)	3	(<1)	52	(48)	131	90	26
Iceland	31	(38)	2	(100)	1	(<1)	6	(36)	55	(91)	55	95	66
Ireland	18	(11)	1	(38)	4	(28)	14	(52)	59	(78)	226	96	57
Italy	30	(2)	2	(36)	16	(14)	7	(38)	40	(31)	448	95	12
Netherlands	27	(15)	15	(<1)	5	(2)	11	(55)	35	(42)	211	93	25
Norway	20	(5)	16	(16)	7	(25)	10	(43)	44	(46)	106	97	30
Spain	31	(14)	3	(7)	6	(20)	7	(51)	44	(57)	243	91	33
Sweden	35	(14)	No information		No information		12	(32)	47	(53)	185	97	35
West Germany (ARD)	30	(2)	<1	(<1)	3	(<1)	9	(20)	37	(22)	137	79	13
West Germany (ZDF)	29	(2)	4	(14)	3	(13)	10	(38)	50	(37)	174	96	23

Calculated from Varis (1985), Table 11.
The data are for two weeks. Figures in bracket are T(n)-S, programme categories as percentage of supply.
1: The deviations from 100% are 'religious', 'unclassified' and 'advertisements'.
2: % of supply.

Annex 3, Table 11: Programme categories' shares of import of television hours in five programme categories in West Europe. 1983.

CO: Country of Origin	T(n)-S/CC % of imports									
	Informational		Educational		Cultural		Children's		Entertainment	
	hours	%	hours	%	hours	%	hours	%	hours	%
USA	10	17	8	24	-	-	59	46	387	48
Great Britain	8	14	16	47	5	18	10	8	115	14
France	2	3	<1	<1	8	29	<1	<1	31	4
Italy	<1	<1	<1	<1	<1	<1	<1	<1	0	0
Sweden	5	8	3	9	<1	<1	<1	<1	0	0
Switzerland	<1	<1	<1	<1	2	7	<1	<1	0	0
West Germany	6	10	2	6	7	25	7	6	55	7
West Europe	21	35	21	62	22	79	17	14	201	25
Others	28	48	5	14	6	21	51	40	223	27
Total	59	100	34	100	28	100	127	100	811	100

From Varis (1983), Tables 11 and 23.
The data are based on two weeks. 'West Europe' are the fourteen countries found in Tables 8 and 9 in the text. The share of total supply from the USA is 44%, from West Europe 43% (16% from Great Britain, 5% from France, 7% from West Germany).

Annex 3, Table 12: Imported shares in six West European countries of supply of television hours in seven time bands. 1977.

TIME	Norway				Sweden				Finland				Ireland				G. Britain				Italy			
	Total supply of hours	Hours imported	T(n)-S: % of supply	% of imports	Total supply of hours	Hours imported	T(n)-S: % of supply	% of imports	Total supply of hours	Hours imported	T(n)-S: % of supply	% of imports	Total supply of hours	Hours imported	T(n)-S: % of supply	% of imports	Total supply of hours	Hours imported	T(n)-S: % of supply	% of imports	Total supply of hours	Hours imported	T(n)-S: % of supply	% of imports
All hours	262	109	42	100	542	195	36	100	477	188	39	100	561	404	72	100	635	138	22	100	898	129	14	100
6 - 7 p.m.	40	15	38	14	57	31	54	16	70	19	27	10	55	37	67	9	42	3	7	2	82	13	16	10
7 - 8 p.m.	42	8	19	7	80	39	49	20	83	39	47	21	72	57	79	14	41	8	20	6	84	23	27	18
8 - 9 p.m.	42	13	31	12	83	43	52	22	84	43	51	23	77	50	65	12	42	19	45	14	84	8	10	6
9 - 10 p.m.	42	26	62	24	83	52	63	27	83	23	28	12	78	49	63	12	42	12	29	9	83	23	28	18
10 - 11 p.m.	35	27	77	25	55	21	38	11	49	35	71	19	74	57	77	14	42	5	12	4	80	20	25	16
6 - 11 p.m.	201	89	44	81	358	186	52	95	369	159	43	85	356	250	70	62	209	47	22	35	413	87	21	67

Calculated from Chapman et al (1986), vol. 2 - 4.
The data are for six weeks and based on one channel in Norway and Great Britain (ITV) and two channels in the other countries, cf. Annex 3, Table 2.

Annex 3, Table 13: Imported shares of supply of television hours in fourteen West European countries, 'all hours' and 'prime time'. 1983.

Country	T(n)-S % of supply	
	All hours	Prime time
Austria	43	61
Belgium	28	33
Cyprus	29	28
Denmark	46	32
Finland	37	37
France	17	17
Great Britain (BBC)	15	21
Great Britain (ITV)	14	20
Great Britain (Ch. 4)	26	15
Greece	39	no information
Iceland	66	66
Ireland	57	58
Italy	18	19
Netherlands	25	24
Norway	30	28
Portugal	39	no information
Spain	33	35
Sweden	35	28
West Germany (ARD)	13	7
West Germany (ZDF)	23	23

From Varis (1985), Table 4.

Annex 3, Table 14: Supply of nationally and multilaterally distributed television hours in ten programme categories. Borlänge, Sweden. 1985. Average per day based on one week. Percentage of total supply. Minutes in brackets[4].

Programme category[1]	Nationally distributed and nationally produced[2]		Nationally distributed but foreingly produced[2]		Multilaterally distributed[3]		Total supply	
News	2	(65)	0	(0)	1	(32)	3	(97)
Factual	4	(130)	2	(65)	5	(162)	11	(356)
Mixed programmes	1	(32)	0	(0)	0	(0)	1	(32)
Theatrical movies	0	(0)	2	(65)	0	(0)	2	(65)
Fiction	1	(32)	2	(65)	13	(421)	16	(518)
Entertainment	2	(65)	0	(0)	5	(162)	7	(227)
Music	3	(97)	0	(0)	41	(1328)	44	(1426)
Sports	2	(65)	0	(0)	4	(130)	7	(227)
Children	2	(65)	0	(0)	0	(0)	3	(97)
Other	3	(97)	2	(65)	0	(0)	6	(194)
Total (%)	22		9		69		100	
Hours per day	11.9		4.9		37.8		54.7	

From Westrell, 1987, Table 3. See Annex 1 for further background information.

1: The rrogramme categories are trenslated directly from the ones used by the Audience Research of SR (no definitions are found in the source). News include imported elements.

2: Two channels (TV1 and TV2).

3: Sky Channel, Music Box, TV5.

4: Calculated form Westrell's (1987) data for use in Table 20.

Annex 3, Table 15: Consumption of nationally and multilaterally distributed television hours in ten programme categories. Borlänge, Sweden. 1985. Average per day based on one week. Percentage of total consumption. Minutes in brackets[4].

Programme category[1]	Nationally distributed and nationally produced[2]	Nationally distributed but foreingly produced[2]	Multilaterally distributed[3]	Total consumption
News	13 (18)	0 (0)	0 (0)	13 (18)
Factual	5 (7)	1 (1)	0 (0)	7 (9)
Mixed programmes	6 (8)	0 (0)	0 (0)	6 (8)
Theatrical movies	0 (0)	8 (11)	1 (1)	9 (12)
Fiction	3 (4)	7 (9)	16 (22)	27 (36)
Entertainment	8 (11)	0 (0)	1 (1)	10 (14)
Music	1 (1)	0 (0)	9 (12)	10 (14)
Sports	11 (15)	0 (0)	5 (7)	16 (22)
Children	1 (1)	0 (0)	0 (0)	1 (1)
Other	1 (1)	1 (1)	0 (0)	1 (1)
Total %	49	18	33	100
Minutes per day	66 (66)	24 (22)	45 (43)	135

From Westrell, 1987, Table 5. See Annex 1 for further background information.

1: The programme categories are translated directly from the ones used by the Audience Research of SR (no definitions are found in the source). News include imported elements.

2: Two channels (TV1 and TV2).

3: Sky Channel, Music Box, TV5.

4: Calculated from the Westrell's (1987) data for use in Table 21.

Annex 3, Table 16: Consumption of nationally distributed television in Denmark according to background variables. 1984-87.

Categories	n	% of consumption of television from: Domestic min.	%	Other Nordic min.	%	Other European min.	%	USA min.	%	Others min.	%	All imports min.	%	Total min.	%
Men	4,607	4,140	62	170	3	1,270	19	1,030	15	40	1	2,510	38	6,650	100
Women	5,247	3,860	63	200	3	1,130	18	970	16	40	<1	2,304	37	6,164	100
Age															
13 - 19	948	3,370	54	150	2	1,360	22	1,320	21	40	1	2,870	46	6,240	100
20 - 29	1,757	3,200	58	150	3	1,090	20	1,070	19	30	<1	2,340	42	5,540	100
30 - 39	2,113	3,440	61	170	3	1,040	18	950	17	40	1	2,200	39	5,640	100
40 - 49	1,608	3,710	62	170	3	1,090	18	960	16	30	1	2,250	38	5,960	100
55 - 66	2,199	4,850	66	220	3	1,280	17	960	13	50	1	2,510	34	7,360	100
> 66	1,229	5,880	68	270	3	1,510	17	920	11	50	1	2,750	32	8,630	100
School															
7 years	3,404	4,750	65	220	3	1,310	18	960	13	50	1	2,540	35	7,290	100
8 - 9 -	1,797	3,810	59	180	3	1,250	20	1,120	18	40	<1	2,590	41	6,400	100
10 - 11 -	3,092	3,610	60	180	3	1,170	19	1,040	17	40	1	2,430	40	6,040	100
12 - -	1,509	3,080	60	140	3	990	19	880	17	20	1	2,030	40	5,110	100
Urbanization															
Copenhagen	2,631	3,650	61	1,600	3	1,170	19	1,000	16	40	1	3,810	39	7,640	100
Provincial cities	4,629	4,110	62	190	3	1,230	19	1,010	15	40	1	2,470	38	6,580	100
Rural districts	2,594	4,160	64	190	3	1,160	18	980	15	40	<1	2,370	36	6,530	100
TV-reception possibilities															
Danish	3,784	4,300	63	210	3	1,240	18	1,030	15	50	<1	2,530	37	6,830	100
Danish + Swedish	3,357	3,900	61	180	3	1,200	19	1,050	17	30	<1	2,460	39	6,360	100
Danish + W. German	1,742	4,030	63	190	3	1,190	19	930	15	40	<1	2,350	37	6,380	100
DK + S + W.G.	540	3,840	61	140	2	1,300	21	960	15	50	1	2,450	39	6,290	100
Total	9,854	4,000	62	180	3	1,200	19	1,000	15	40	1	2,420	38	6,420	100

Calculated from Denmark's Radio's audience research, cf. Annex 1.
Data based on ten weeks.

Annex 3, Table 17: Domestic and imported shares of consumption and supply of television hours before and after 7.30pm. Denmark. 1984-87.

I(n)-S/CO and I(n)-C/CO
% of total consumption and supply

	Country of origin														
	Nordic countries		Other W. European countries		USA		Others		Total import		Domestic		Total Minutes		%
	Before	After	Before	After	Before	After	Before	After	Before	After	Before	After	Before	After	
Supply	2	4	33	17	6	12	1	1	42	36	58	64	20.290	17.310	100
Consumption	2	3	24	19	14	16	1	1	41	37	59	63	1.530	4.890	100
Coefficient of utilization	5	6	5	26	17	36	6	6	7	29	7	28	8	28	/

Calculated from Denmark's Radio's Audience Research, cf. Annex 1.
Data based on ten weeks.

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